OUTREACH|IT

User Manual

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CRMADDON's Online Help

Outreach|IT addon allows sending newsletters, advertisements, announcements, products and service information to your customers automatically. With this tool you can target a specific group of customers and select a time range for your emails.

Make your workflow more efficient and save your time for manual processing. Built in Service will make emails sending automated and will run the tasks in specific period of time. Your scheduled emails will reach the needed group and responsible record manager will be set as a sender.

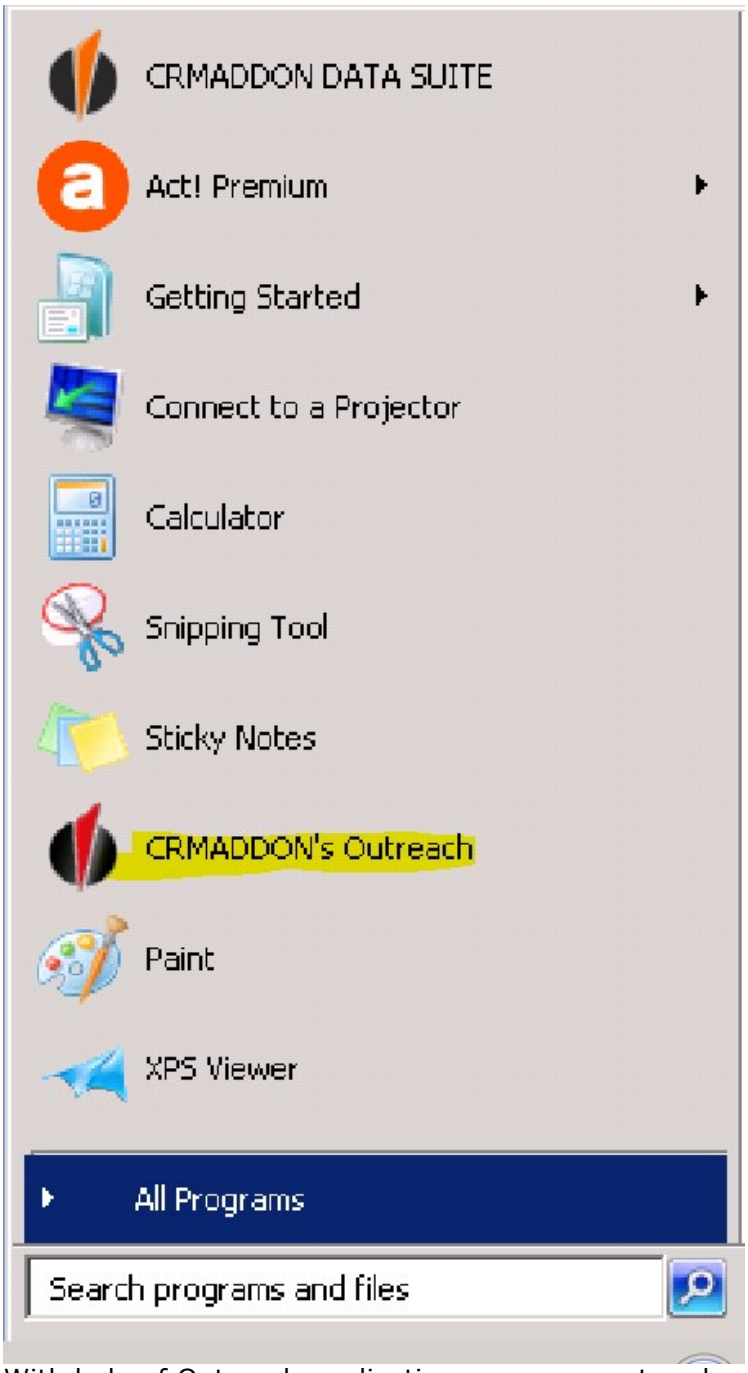
Most popular pages

- Welcome
- Outreach Options
- How to define Outreach settings
- How to create email template
- How to create Outreach Schemas
- Creating Reports
- How to add a clickable link in HTML report
- Jobs Schema
- About Outreach|IT
- Schema Send Email Wizard

Outreach Installation

***IMPORTANT*: Before installation, please ensure that you have administrator permission on the computer where you would like to install our software. Installation has been tested and it runs without any issues if you have admin rights on your machine. Please consult with your IT experts regarding your machine permissions. After you get the admin permission we can help you to install the software.**

After you have downloaded OUTREACH|IT.exe file, click on it to start installation process. Then, please accept our terms and conditions and proceed with installer prompts. In case you experience any issues regarding our product installation, please provide us with detailed steps how we can reproduce it and create a ticket via our support suite with detailed description.
After the installation, please start Outreach and proceed with your license registration.



With help of Outreach application you can create schemas for automated emails newsletters sending, emails printing, create email templates and put bounced emails to separate groups.

See also

Welcome
Email Marketing with Outreach|IT
Licensing

RDP License
System Requirements
About Outreach|IT
Quick Start
How to Use OUTREACH|IT
Outreach Settings
Creating Reports
How to create email template
How to create Outreach Schemas
Report Designer
Report Editing Basics
Create Reports
Report Designer Reference
Preview and Print Reports
Support

Email Marketing with Outreach|IT

See also

Welcome
Outreach Installation
Licensing
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How to create email template
How to create Outreach Schemas
Report Designer
Report Editing Basics
Create Reports
Report Designer Reference
Preview and Print Reports
Support

Licensing

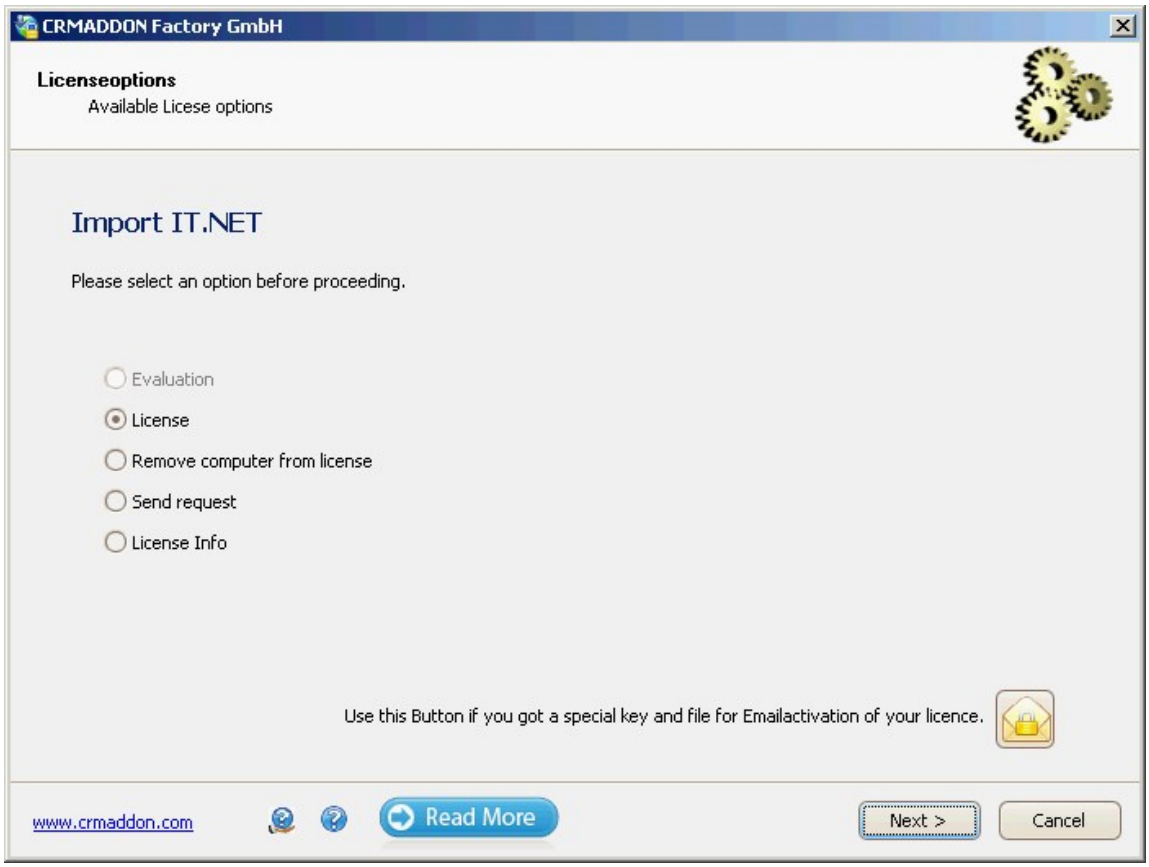
When you install a new addon, it is required to be licensed. For testing purposes a trial period is offered, so you are welcome to start with evaluation and then purchase a license if you decide to continue using the product.

Almost all addons offered by CRMAddon Factory have 14 days fully functional trial period. The following addons have some limitations:

1. DialIT - 'Repair Phone Numbers' feature is not available
2. ImportIT - Scrambles importing lists, i.e. does not allow to import information exactly as it appears in the source file, allows only 10 records importing. SQL connect is not possible as well
3. ScanIT allows scanning only 5 business cards per run
4. ExportIT allows exporting only 10 records per run.

For licensing a convenient license wizard will open.

You will need to follow its steps to evaluate or register the product with your license. It has the following look:



With this wizard you can start evaluation, register your license, remove computer from license, send request to our support team or get information about your license.

Email License

Evaluation

License

Remove computer from license

Send Request

License Info

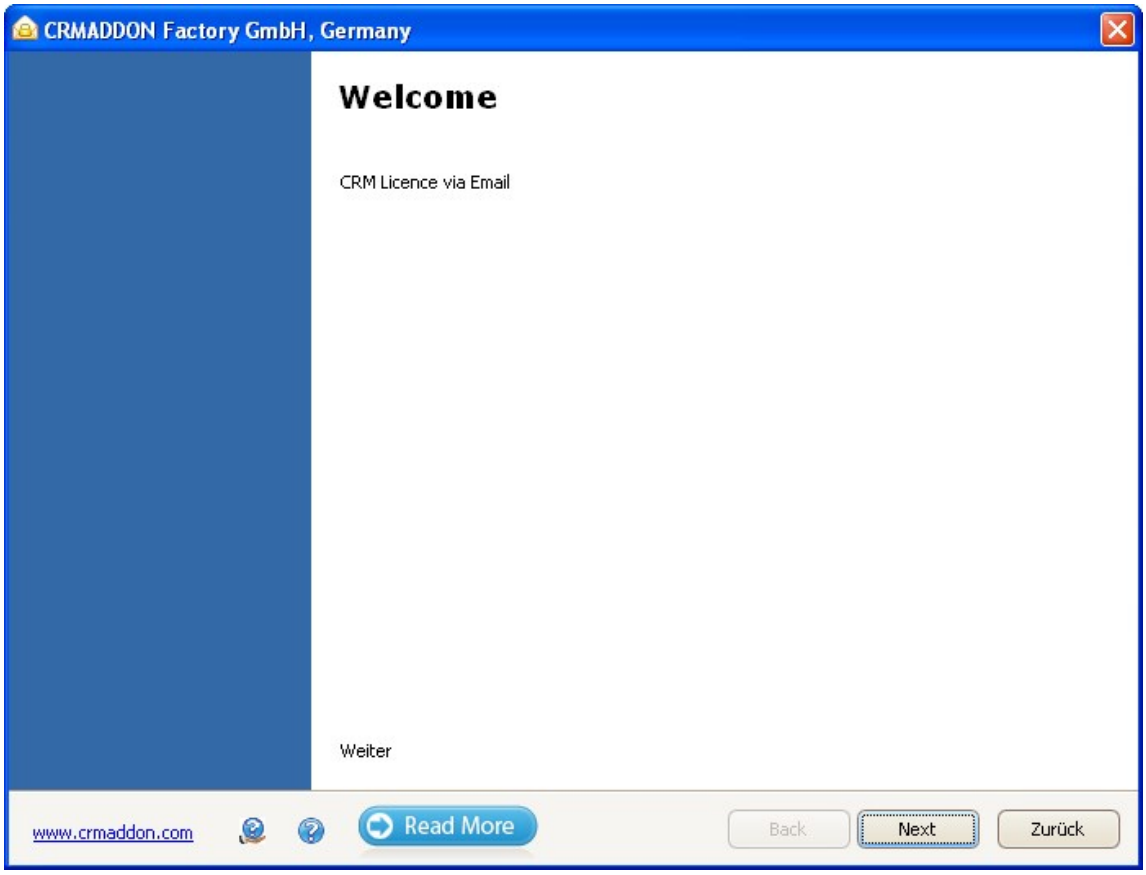
See also

- Welcome
- Outreach Installation
- Email Marketing with Outreach|IT
- RDP License
- System Requirements
- About Outreach|IT
- Quick Start
- How to Use OUTREACH|IT
- Outreach Settings
- Creating Reports

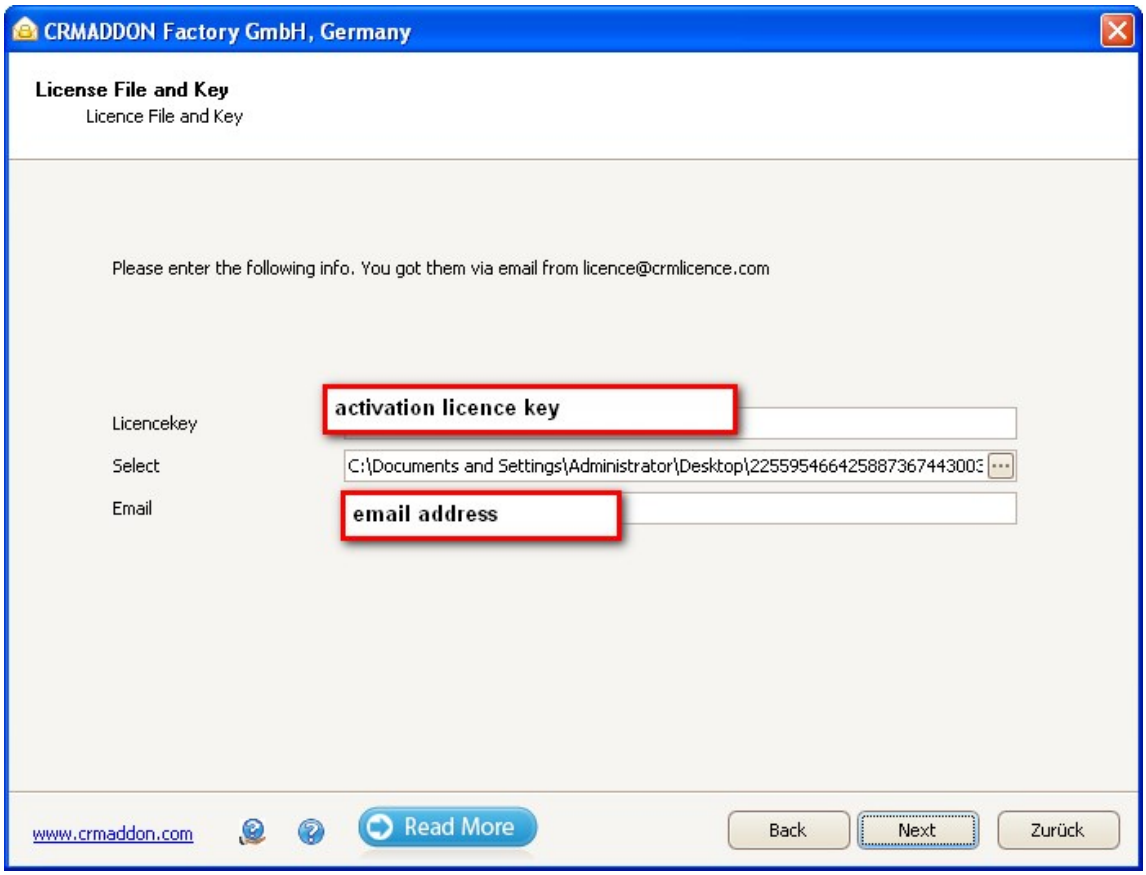
- How to create email template
- How to create Outreach Schemas
- Report Designer
- Report Editing Basics
- Create Reports
- Report Designer Reference
- Preview and Print Reports
- Support

Email Activation

In case you need to perform an activation via email, this can be done by using Email Activation option. In this case you should have your license file and license key, which were sent you by email. To start Email Activation Wizard click button:



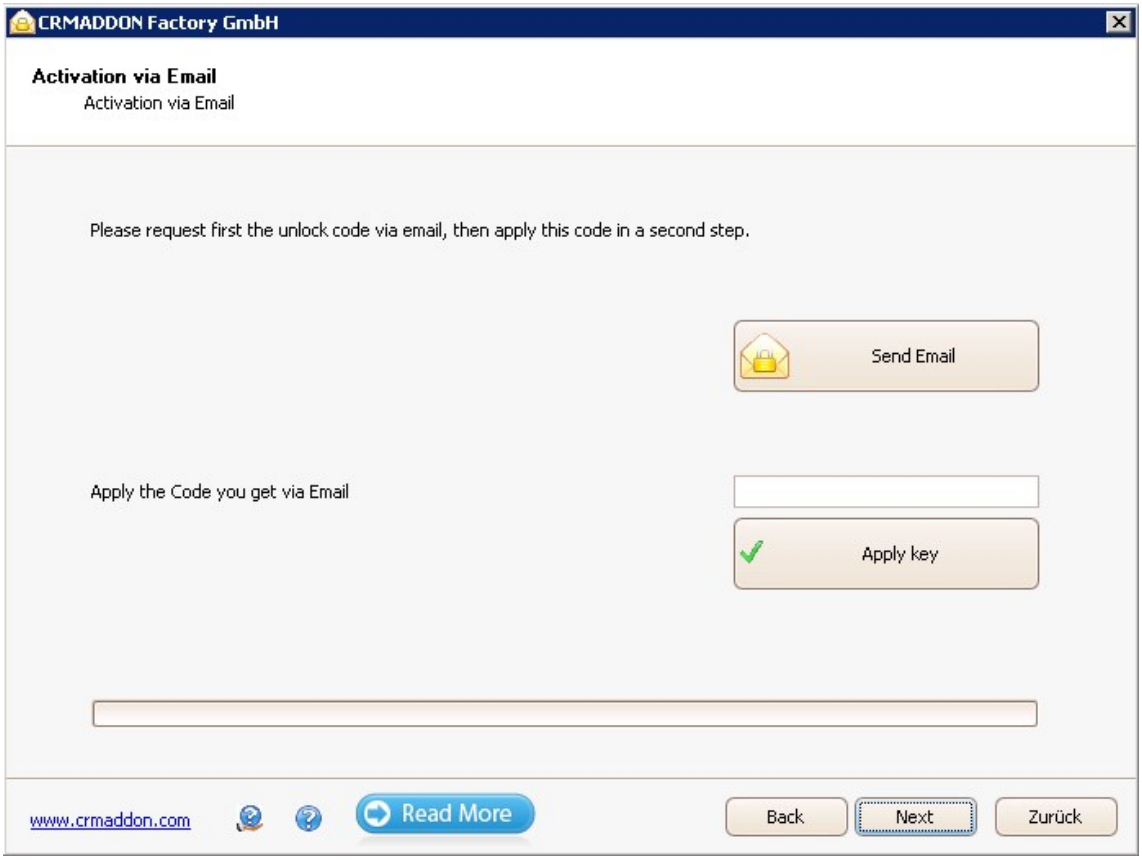
Then you would need to insert your registration license key, specify a link to the folder where your license .lic file is stored and provide your email:



On the following dialog you should request an unlock code sending. It will be sent to your email specified on the previous step, you will get the following notification if the email has been sent successfully:

CRMADDON Factory ACT! Addons
Email was sent. You will get a response Email within the next 2-3 days with your Unlock Code for the next step. Then you can use the Software with all functions.
OK

Then you'd need to insert this key and press "**Apply Key**" button:



If the code was correct, you'll get the following notification:

This means the addon has been successfully activated. Press '**Next**' to complete and exit the Email Registration Wizard.

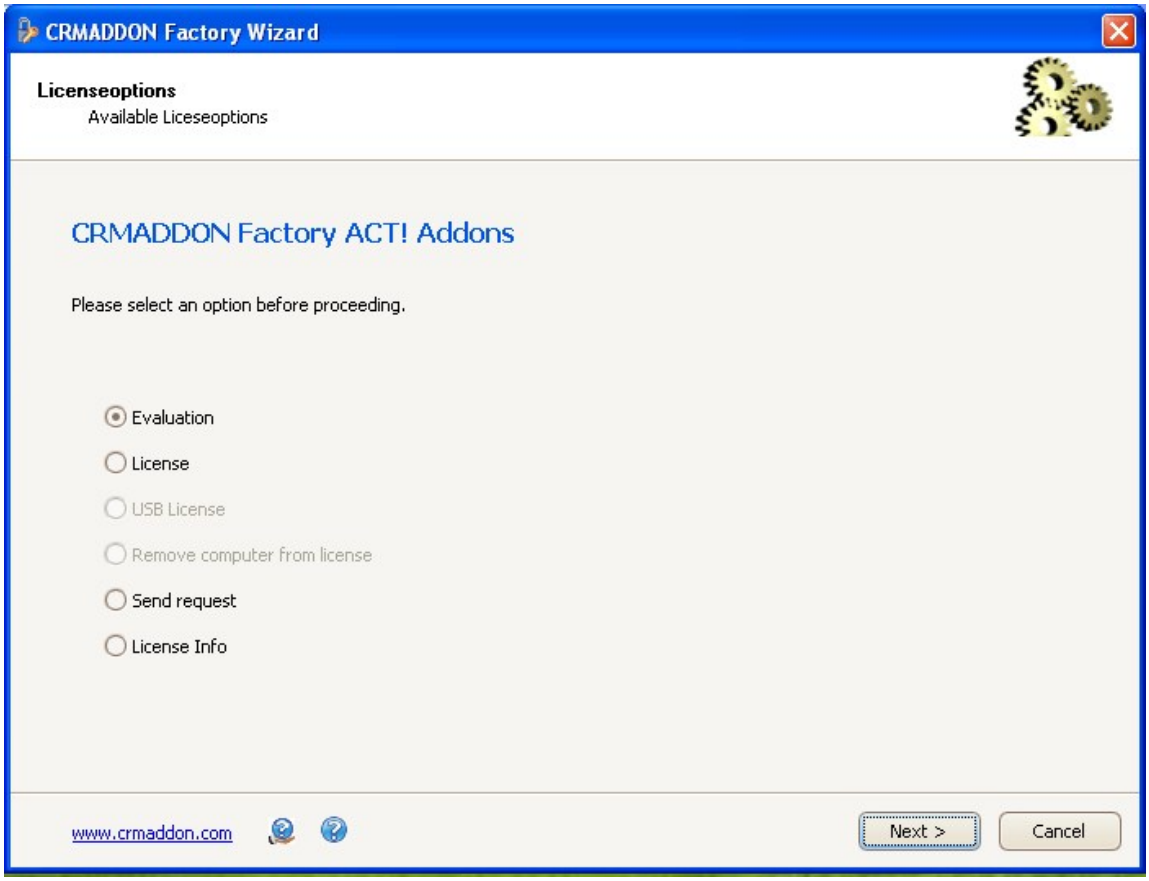
See also

Evaluation
License
Remove computer from license
Send Request
License Info

Home > Licensing > Evaluation

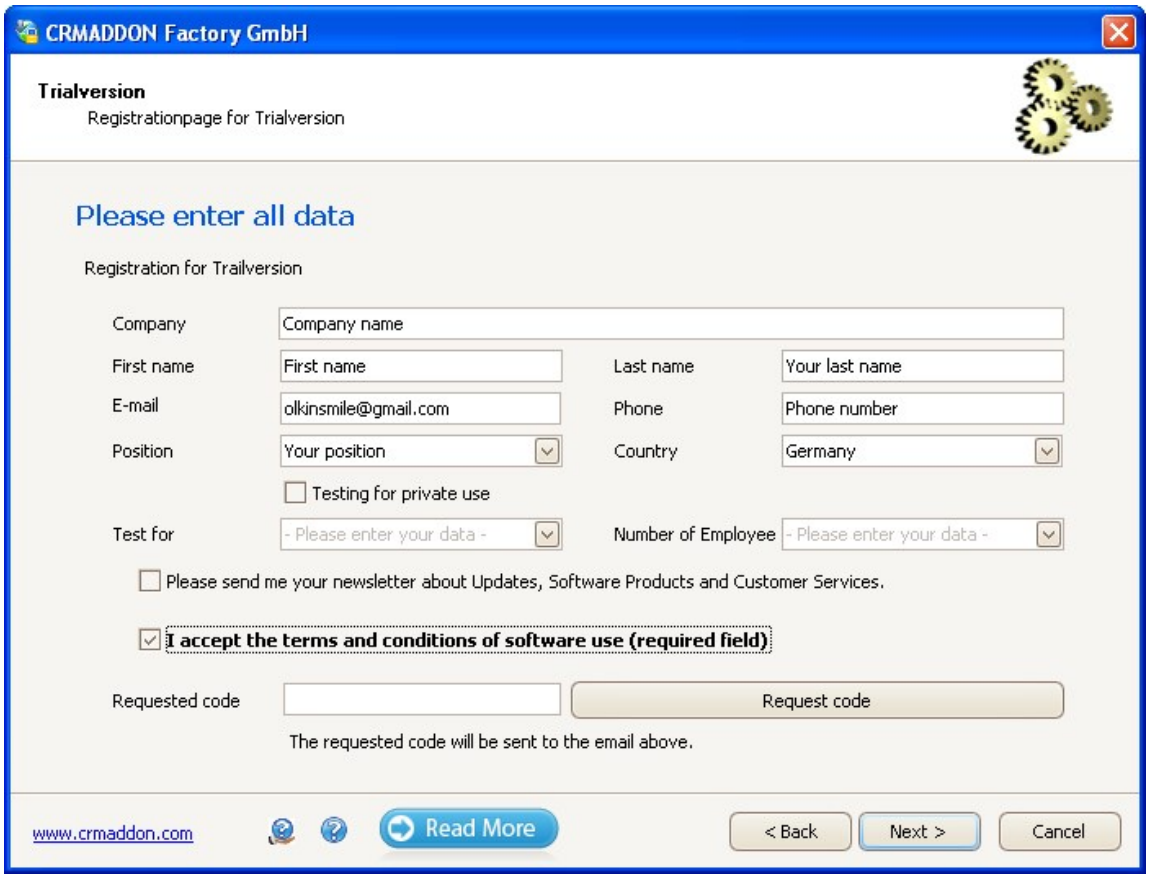
Evaluation

To start free trial period you need to select '**Evaluation**' option on the Start Wizard page:

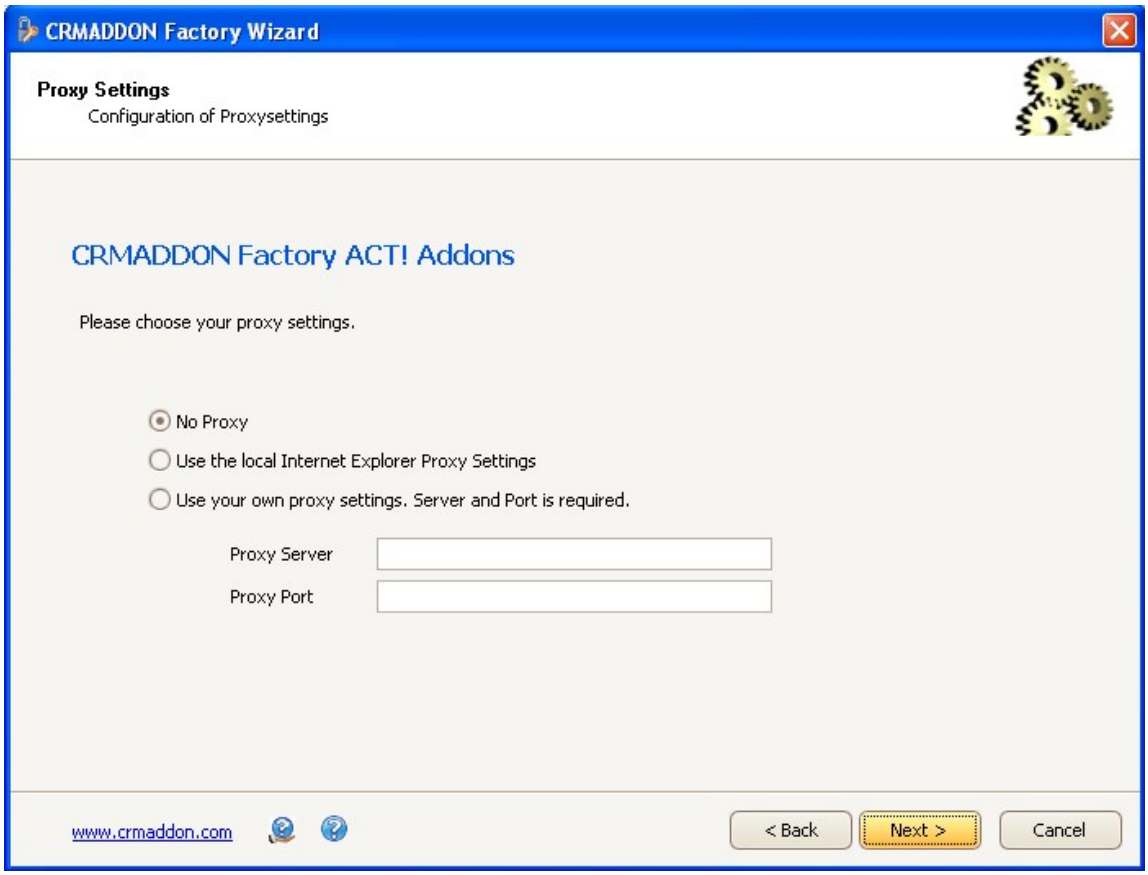


On the next form you will need to register your details and validate your email by sending a code to it.
To send a code, please do the following:

1. click '**Request code**' button.
2. Once you receive a code to your email, please copy it
3. Then paste to the '**Requested code**' field
4. Click '**Next**' button to proceed further



On the next step you will need to specify you connection settings. If you use proxy for connecting to the Internet, then, please add server and port to the corresponding fields. 'No proxy' should be selected if you use direct connection to the Internet.



Then you will need to click **'Finish'** button to exit the Wizard and complete evaluation registration.

Each time you start the addon the program will offer you to purchase a license or to continue using the evaluation:

To proceed with trial just click 'Ok' button. On this window you will see the name of the addon you are using and how many days of trial are left.

If you would like to purchase a license you will need to click **'Buy now'** button.

If you experience any issues and need our assistance, please click the following button at the bottom of the Wizard to create a support ticket

To open our User Manual, please click button at the bottom of the Wizard.

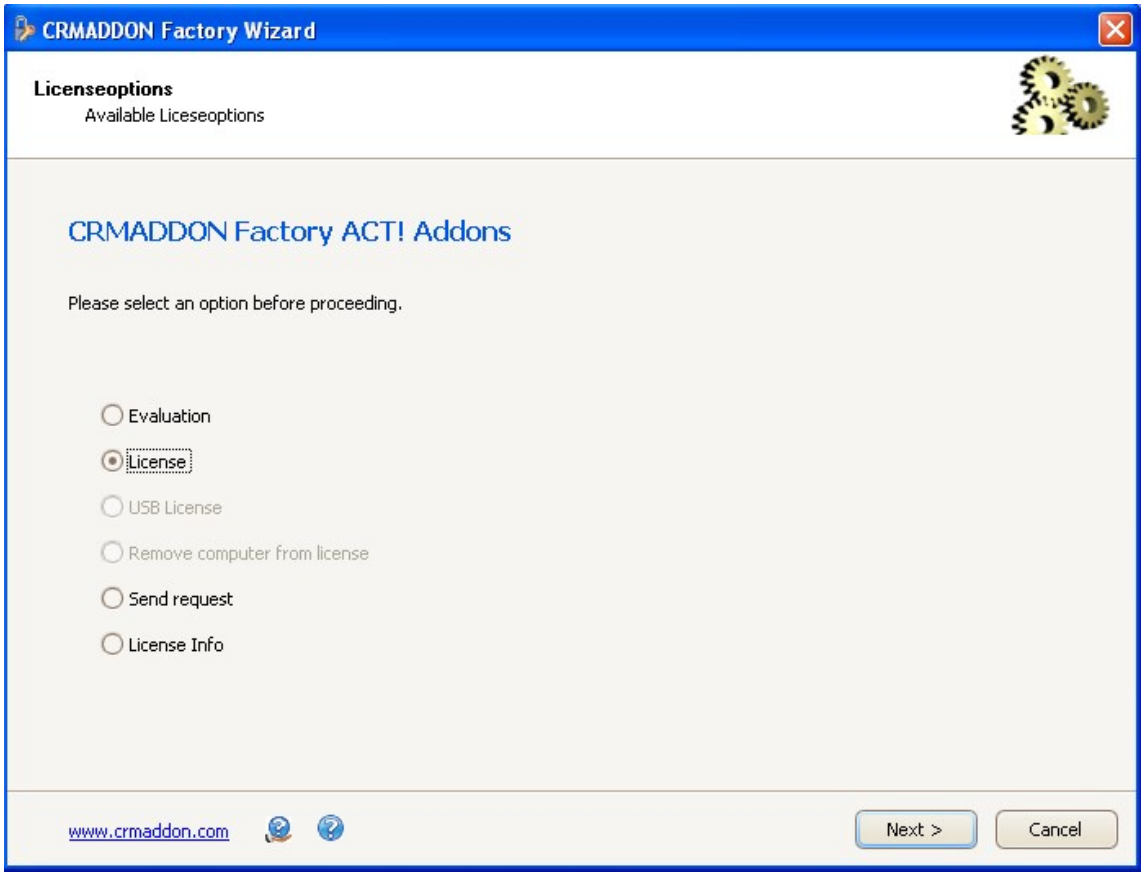
See also:

Email License
License
Remove computer from license
Send Request
License Info

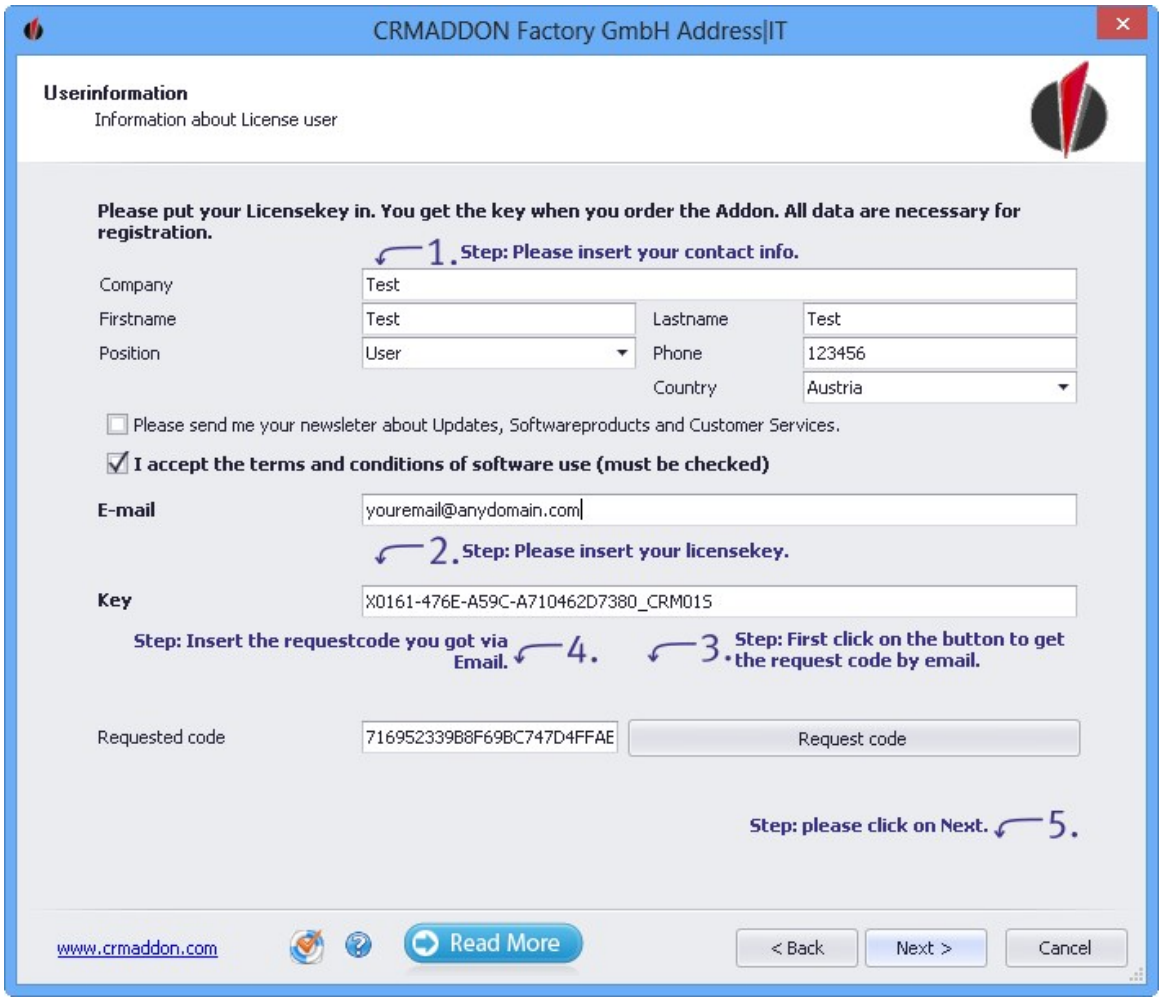
License

By selecting this option you can license the product you are using. To do this you need to specify the registration key you received from our team. The license is provided per user computer, i.e. single licence is for 1 machine where the software is installed. If you purchase 3 licenses you will receive one license key which should be used for all machines. The system automatically connects to the server and checks your license, e.g. if there are

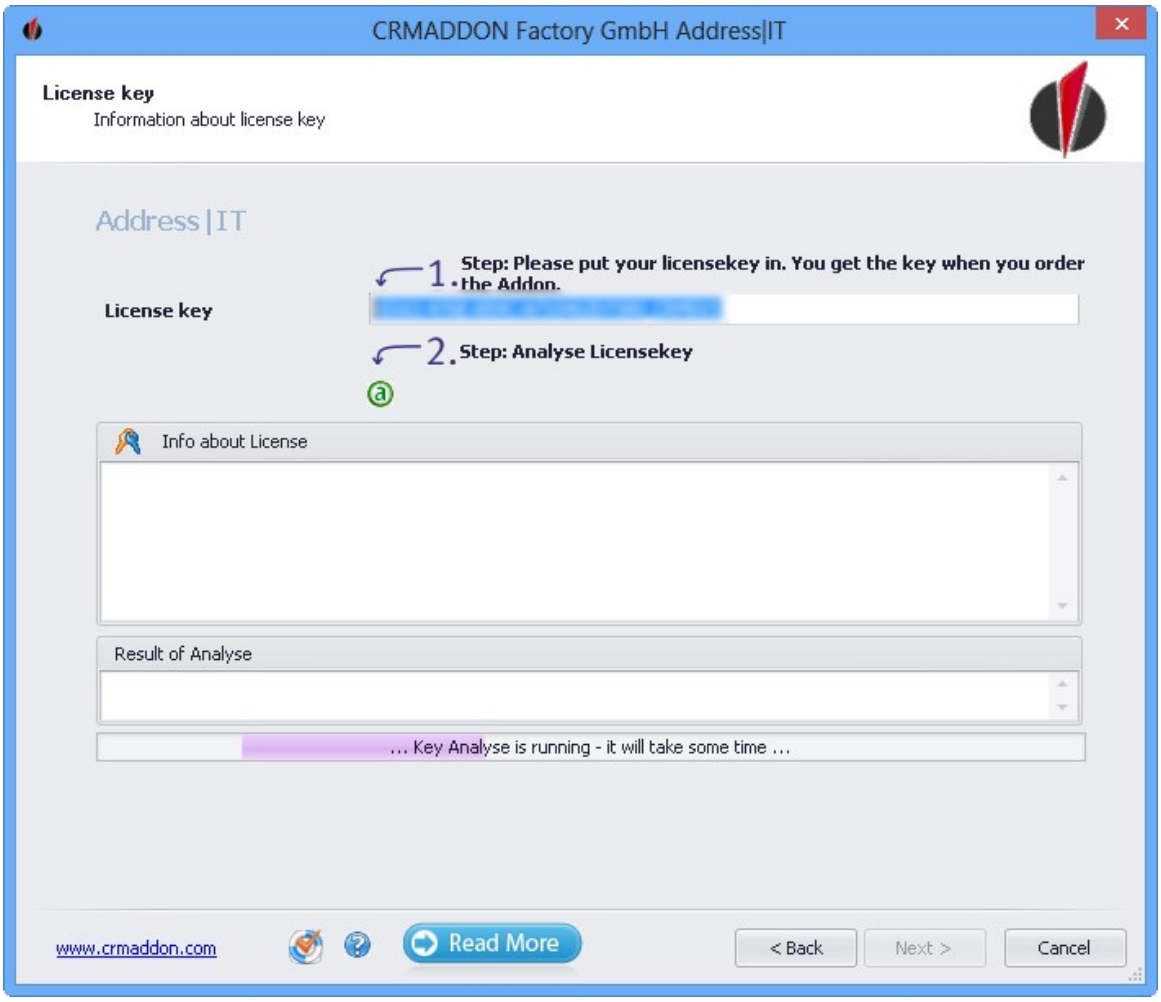
available licenses for your computers or not.



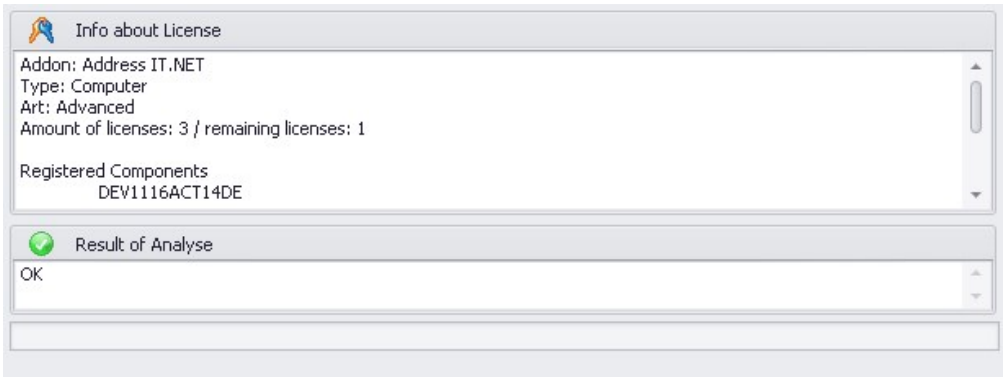
On the next window you will need to fill out the following form and validate your email by requesting a code.
For this purpose, please fill out all fields, except 'Requested Code' and click '**Request Code**' button, the validation code will be sent to the email you have specified. Then you will be able to proceed with license registration by entering the code and clicking 'Next' button



On the next step the system will check if your license key is valid or not, this might take some time, click analyse button to start analyse:


CRMADDON Factory GmbH Address|IT
License key
Information about license key
Address|IT
1. Step: Please put your licensekey in. You get the key when you order the Addon.
License key
2. Step: Analyse Licensekey
Info about License
Result of Analyse
... Key Analyse is running - it will take some time ...
www.crmaddon.com
Read More
< Back
Next >
Cancel

The application will connect to the server and check the entered license key. If the analysis result returns Ok, you will be able to proceed further and run registration by clicking Run registration button.



After registration completing you need to click **'Next'** to proceed further:

CRMADDON Factory GmbH Address|IT
Completing the wizard
Thank you for choosing our software solution. You made a good choice by utilizing our addon for your CRM system. Our main goal is to help you run your business more efficiently, improve workflow and streamline your work process. Visit our Homepage for more Addons.
CRMADDON
www.crmaddon.com
To close this wizard, click Finish
www.crmaddon.com
Read More
< Back
Close

Click **'Close'** button to finish licensing and exit the Wizard.

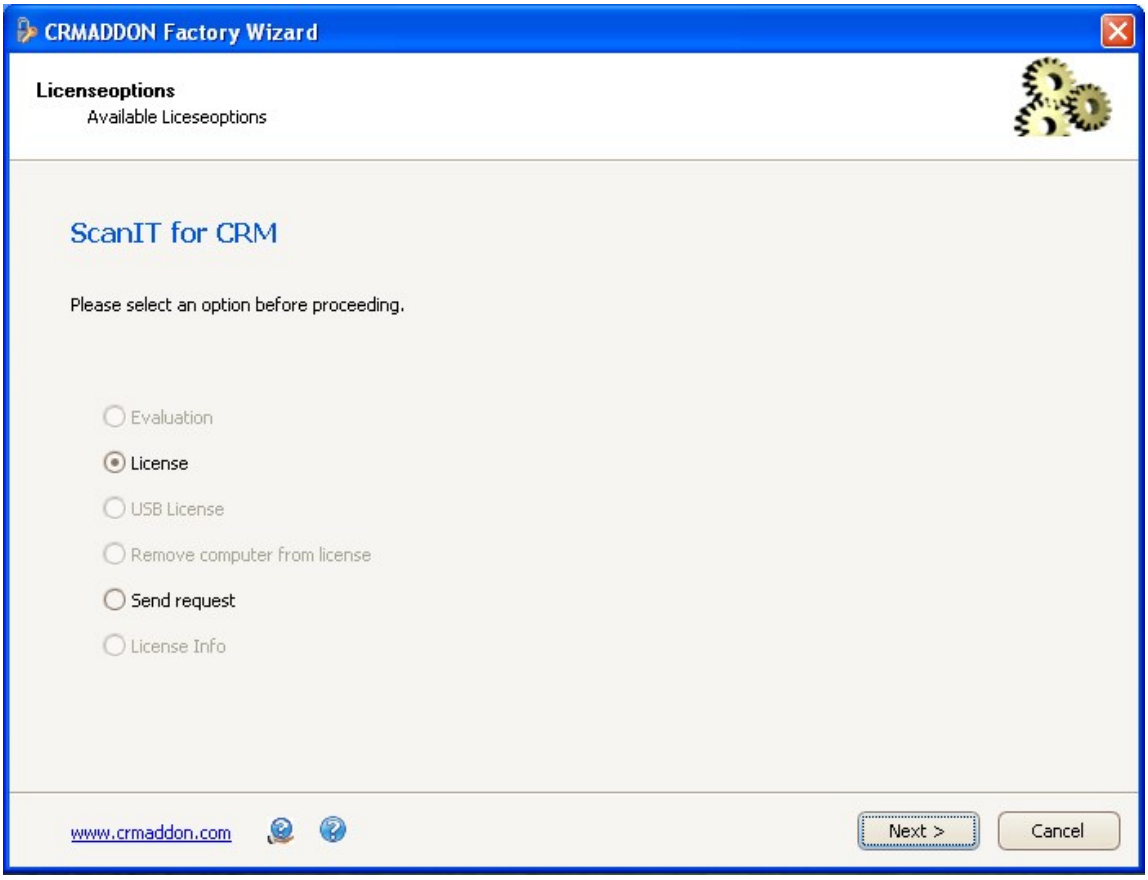
See also:

- Email License
- Evaluation
- Remove computer from license
- Send Request
- License Info

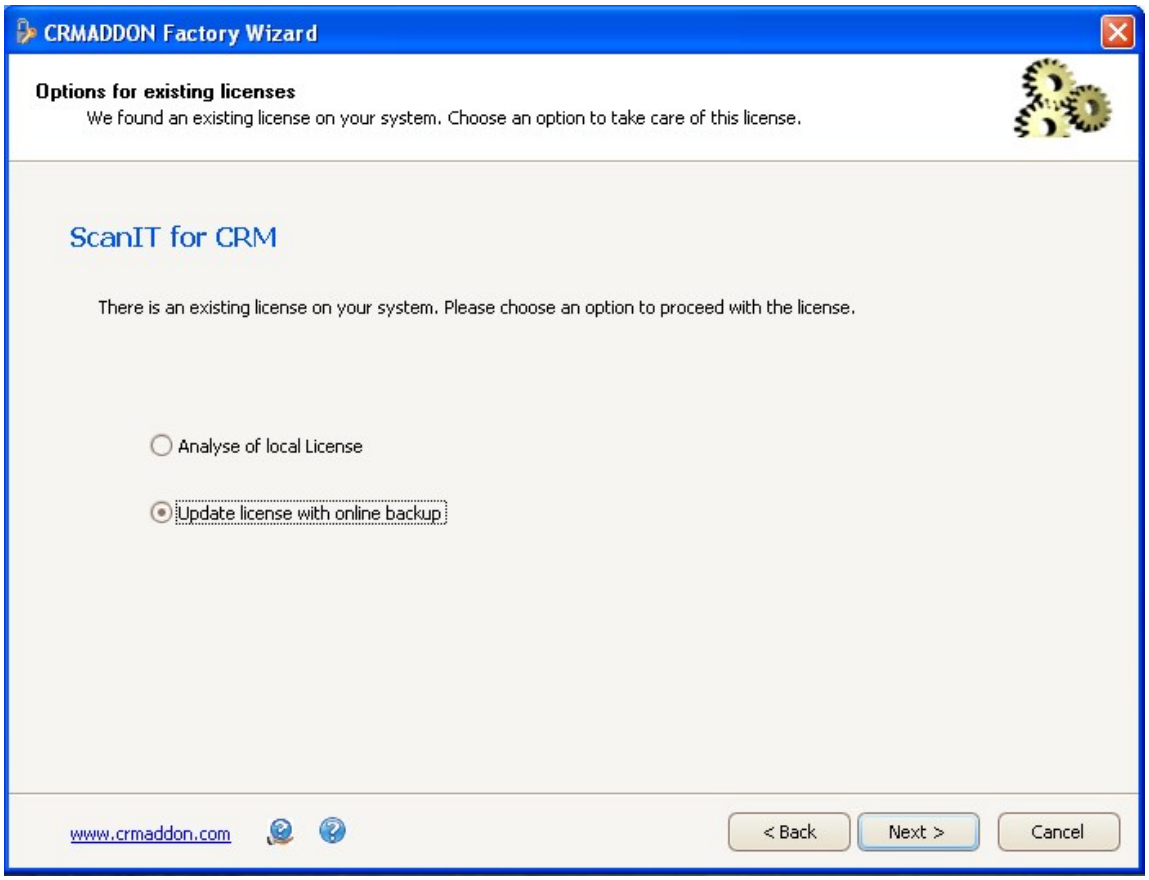
Update license

To update your license you need to open **'License and support'** window in your addon and follow License tab there. On this tab you need to click **'Wizard for Registration'** button

. This will start licensing Wizard, where you can select **'License'** option to proceed with updating:



On the next window you will need to select whether you would like to analyse your current license or update the license with online backup.


CRMADDON Factory Wizard
Options for existing licenses
We found an existing license on your system. Choose an option to take care of this license.
ScanIT for CRM
There is an existing license on your system. Please choose an option to proceed with the license.
Analyse of local License
Update license with online backup
www.crmaddon.com
< Back
Next >
Cancel

If you select **'Analyse of local license'** you will need to click 'Analyse button' on the opened window to get details about your current license. To proceed with updating you will need to select **'Update license with online backup'**. The further steps will be the same as when you register for the first time. Please find detailed instructions on the **'License'** page.

If you experience any issues and need our assistance, please click the following button at the bottom of the Wizard to create a support ticket

To open our User Manual, please click button at the bottom of the Wizard.

See also:

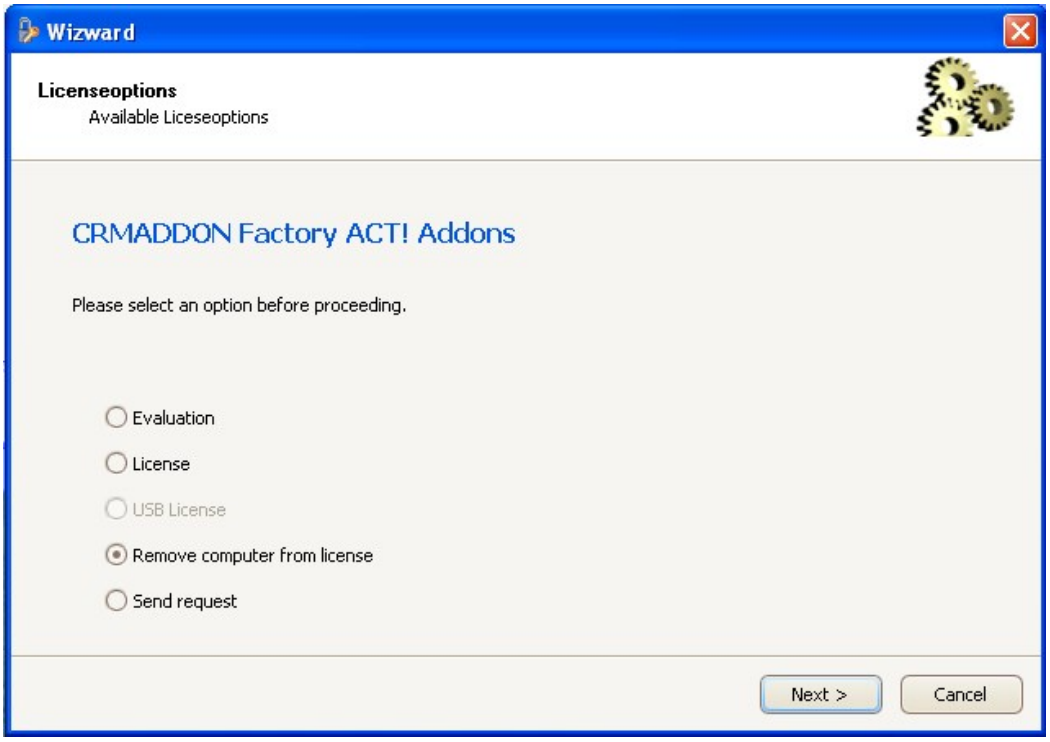
Remove computer from license

This option allows moving the license to another machine. It is possible to change computers only twice then it will not be possible to reset a license. For example if you have a single machine license you can change the computer twice. In case you need to do this more times you will need to create a ticket for our support team.
In case you have already uninstalled the program on your old machine and would like to install it to a new one. Please install it and then via licensing wizard remove it from your old PC. The license keeps computer name so it will be displayed under registered computers.

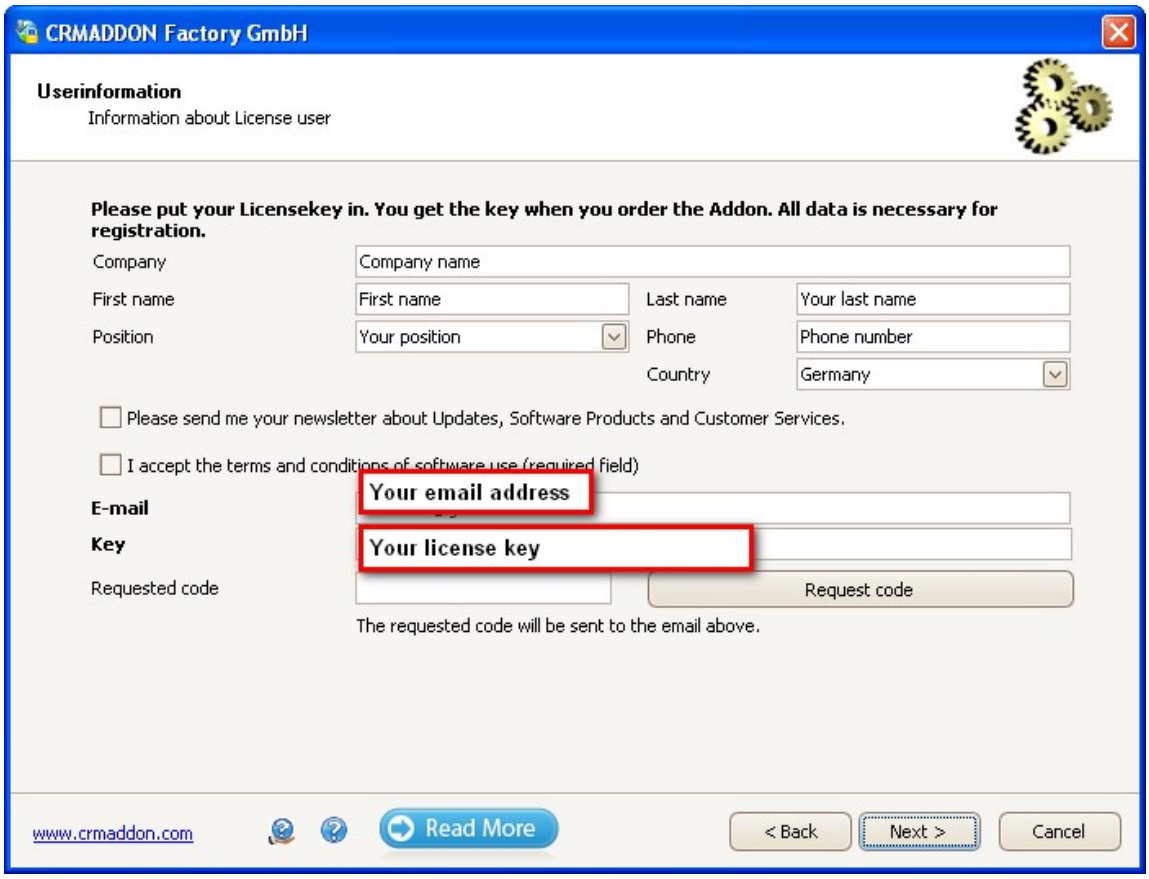
To remove the computer you need to click **'License and support'** button

and then select **Wizard for Registration** on the License tab:

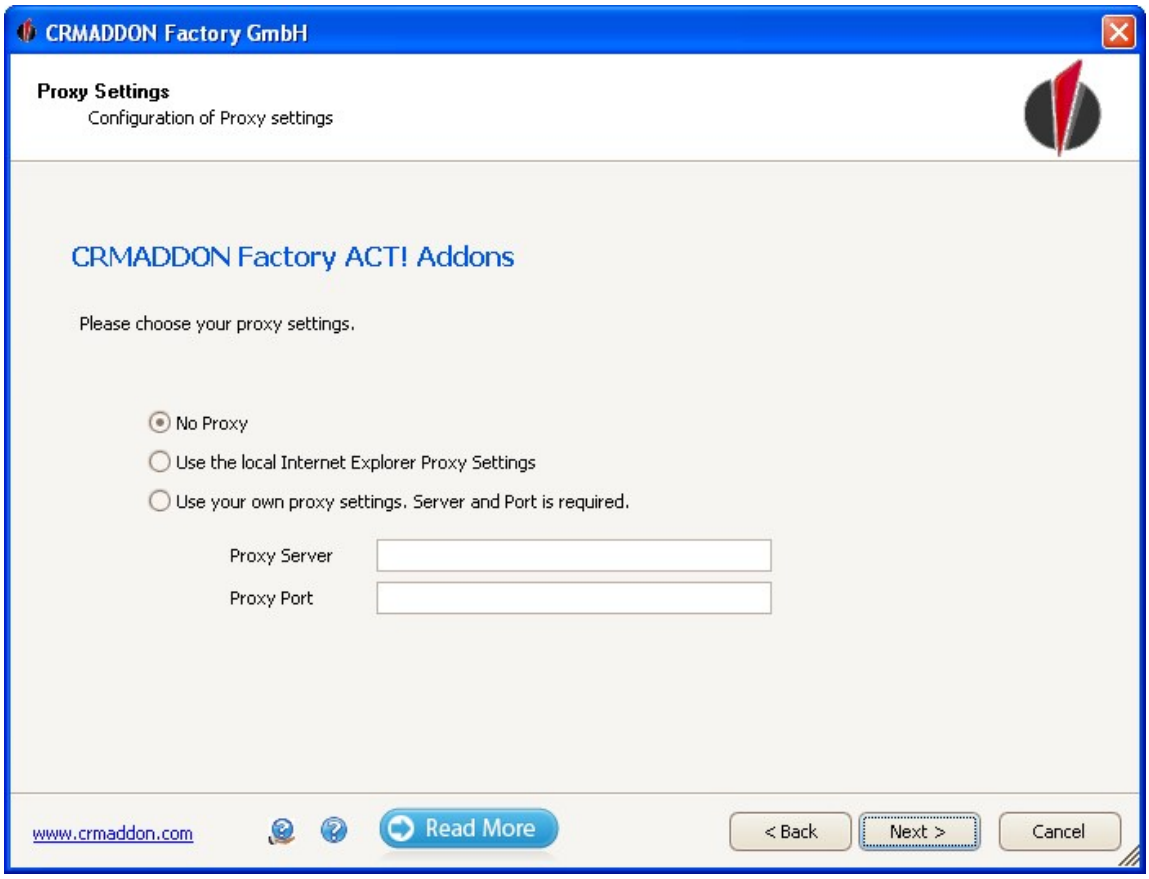
On the opened window you will need to select **'Remove computer from license'** option.



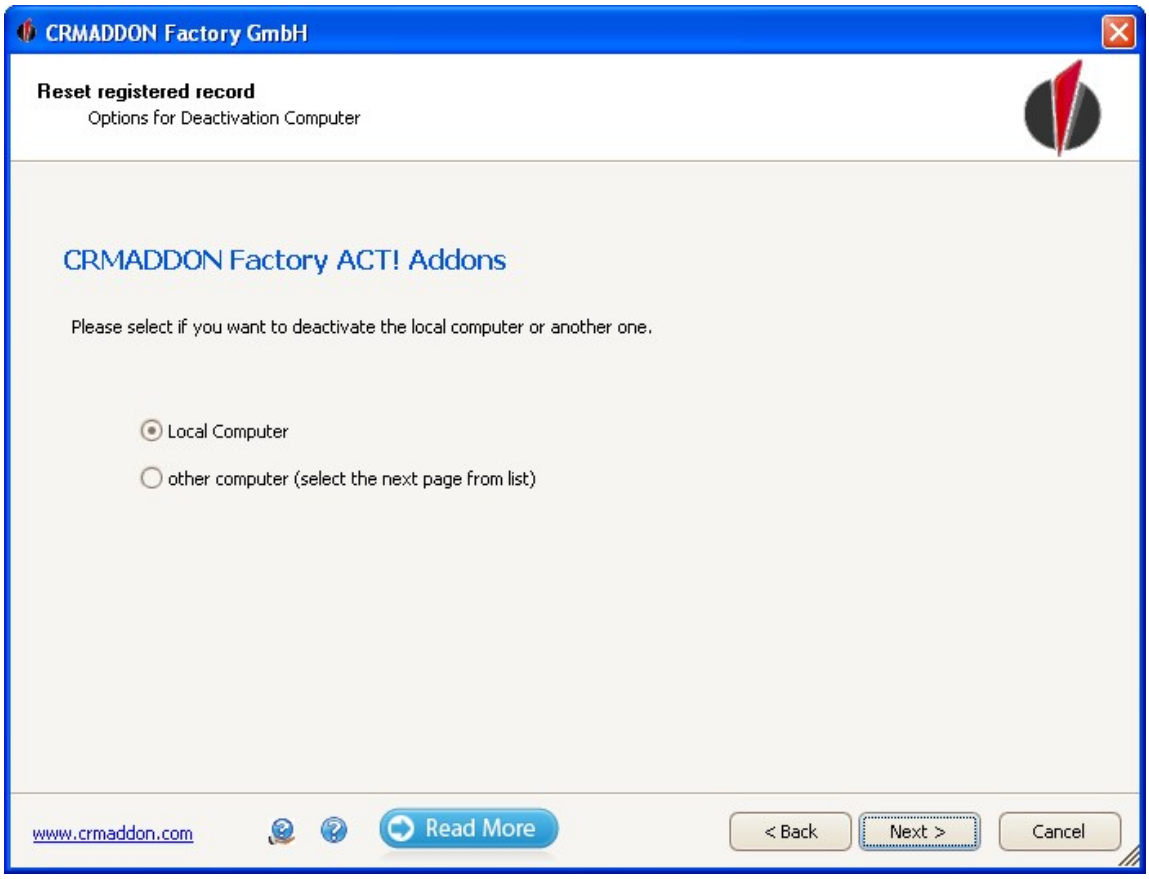
Then you will need to provide your license and user information. To request the code, please click '**Request Code**' button and then copy the code sent to your registered email to the '**Requested Code**' field and proceed by clicking **'Next'**.



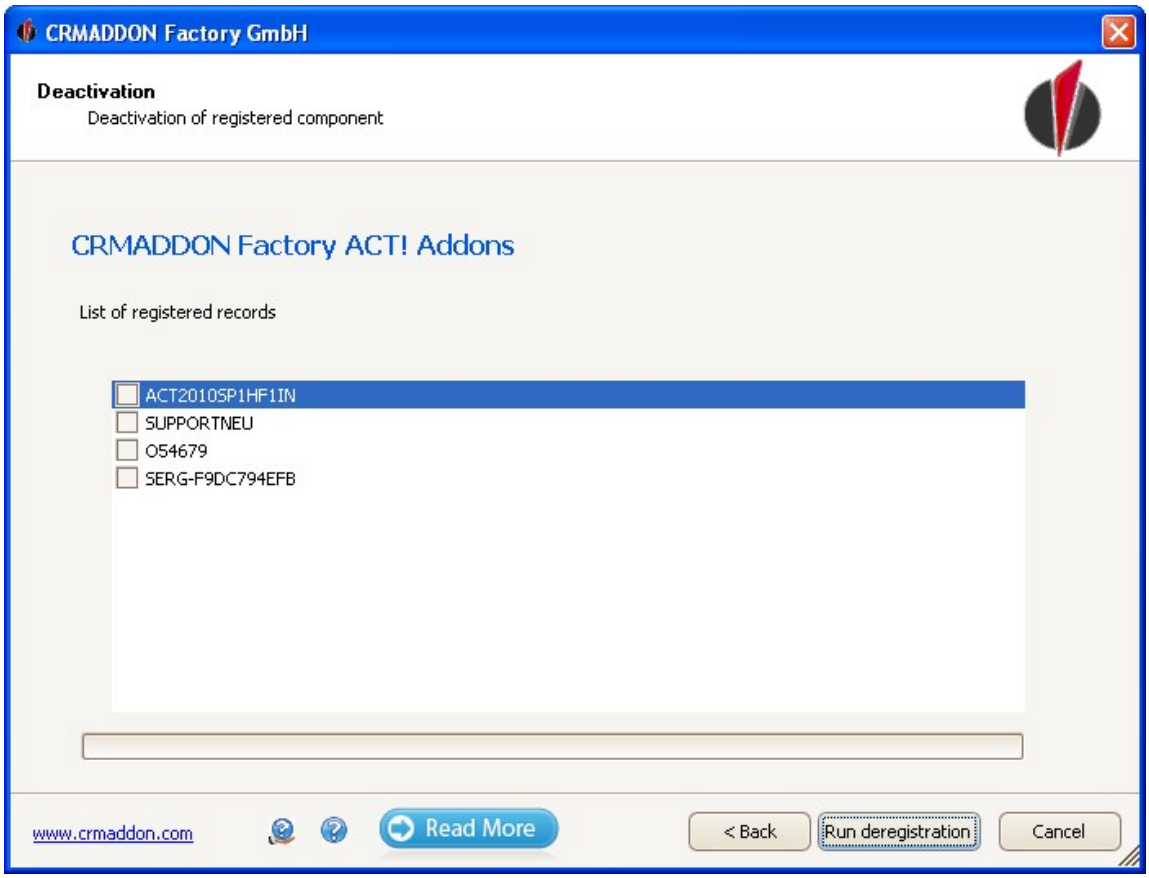
On this window you need to select connection options you have. If you have a direct connection to the Internet, then select **'No proxy'** option:



On the next window, please select an option you would like to proceed with: whether you would like to deactivate a local computer or select another machine from the list:


CRMADDON Factory GmbH
Reset registered record
Options for Deactivation Computer
CRMADDON Factory ACT! Addons
Please select if you want to deactivate the local computer or another one.
Local Computer
other computer (select the next page from list)
www.crmaddon.com
Read More
< Back
Next >
Cancel

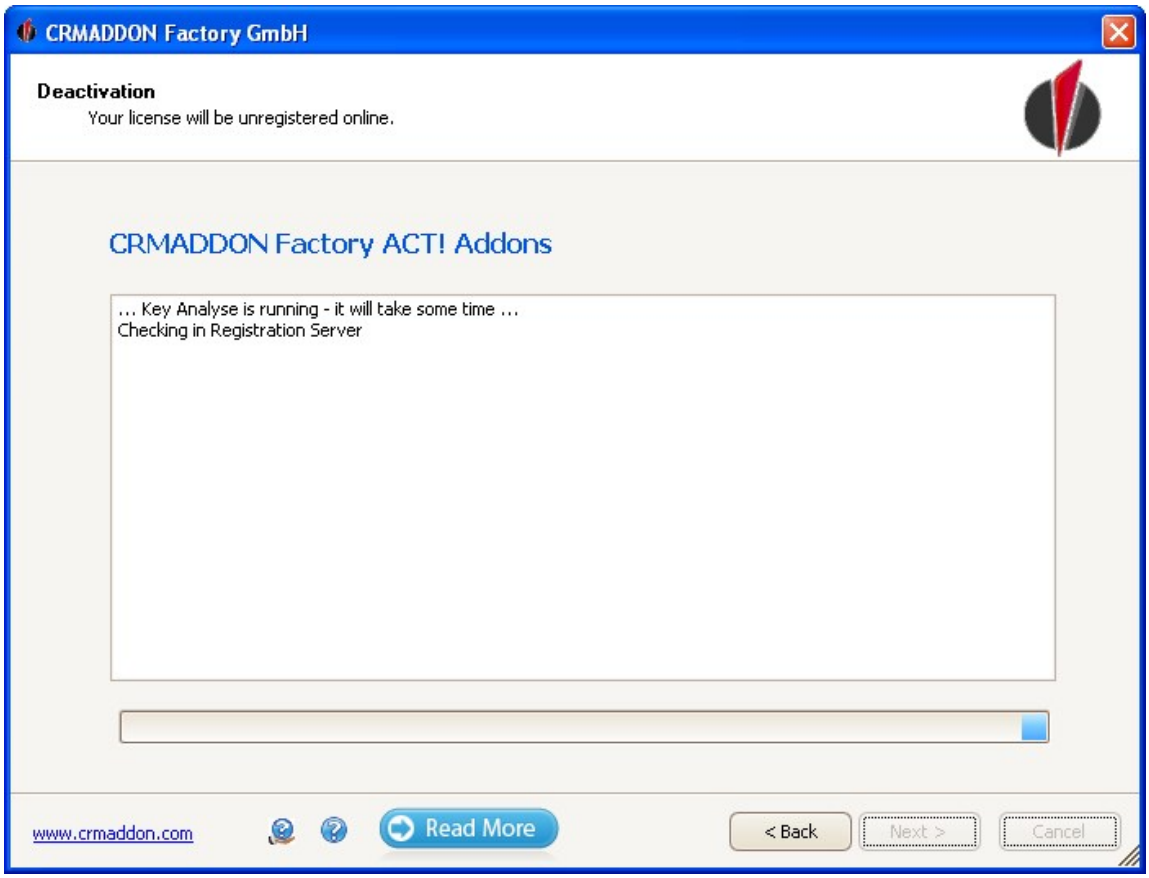
If you need to deactivate some other machine, please select **'Other computer'** option, the following window will open:



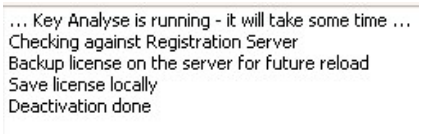
Here you can select the computer you would like to deactivate, click **'Run deregistration'** button to proceed further.

If you select **'Local Computer'** option, the system will ask you to confirm deactivation:

Click **'Yes'** to proceed with deactivation:



Once the system finishes license key checking, the following text will appear notifying that the deactivation has been completed:


... Key Analyse is running - it will take some time ...
Checking against Registration Server
Backup license on the server for future reload
Save license locally
Deactivation done

Click **'Next'** button to proceed and then **'Finish'** to close the Wizard.

If you experience any issues and need our assistance, please click the following button at the bottom of the Wizard to create a support ticket

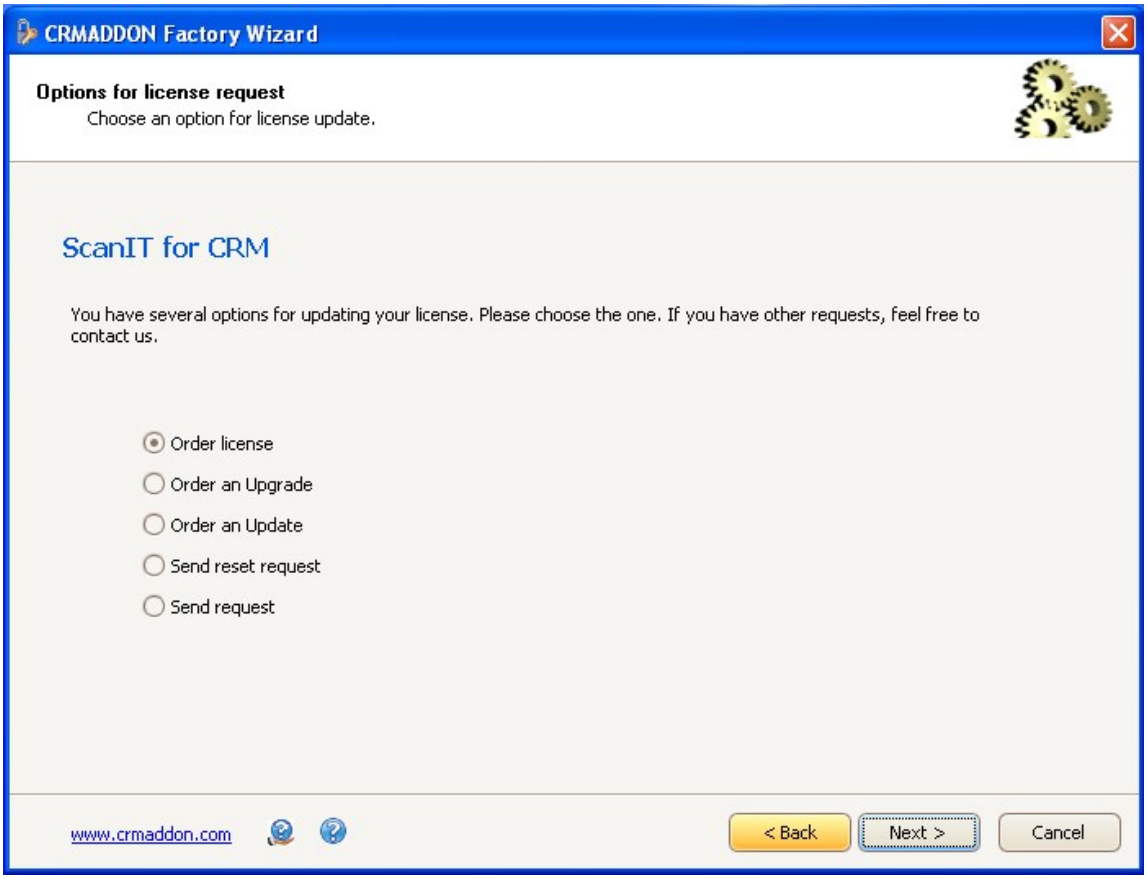
To open our User Manual, please click button at the bottom of the Wizard.

See also:

Email License
Evaluation
License
Send Request
License Info

Send Request

Use this option if you would like to send us a request concerning upgrading your ACT! version, ordering license, adding more computers to the license or resetting a computer from license:

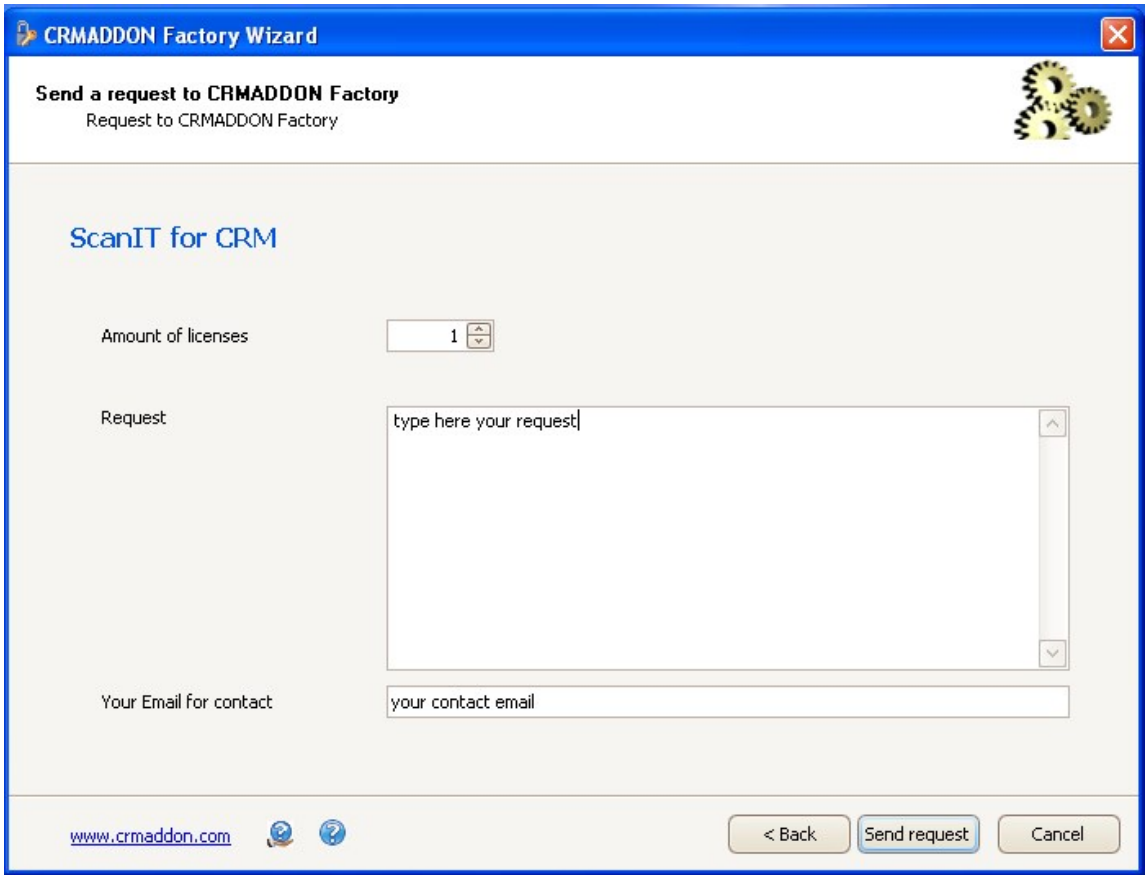

CRMADDON Factory Wizard
Options for license request
Choose an option for license update.
ScanIT for CRM
You have several options for updating your license. Please choose the one. If you have other requests, feel free to contact us.
Order license
Order an Upgrade
Order an Update
Send reset request
Send request
www.crmaddon.com
< Back
Next >
Cancel

See also:

Email License
Evaluation
License
Remove computer from license
License Info

Order License

Select this option if you would like to send us a request for license ordering. The following window will open:



On this window you will need to specify the amount of licenses you would like to order, type your request and provide your contact email.

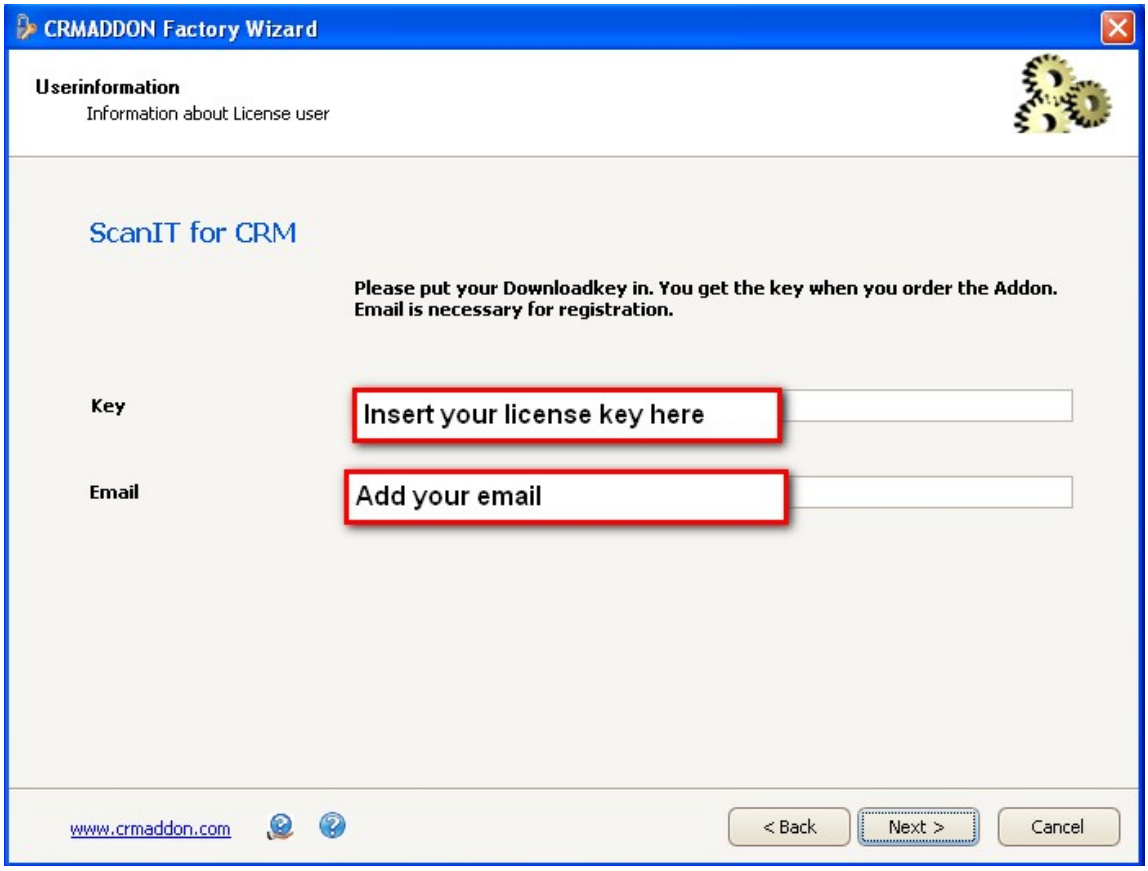
See also:

Order an Upgrade
Order an Update
Send Reset Request
Send Request

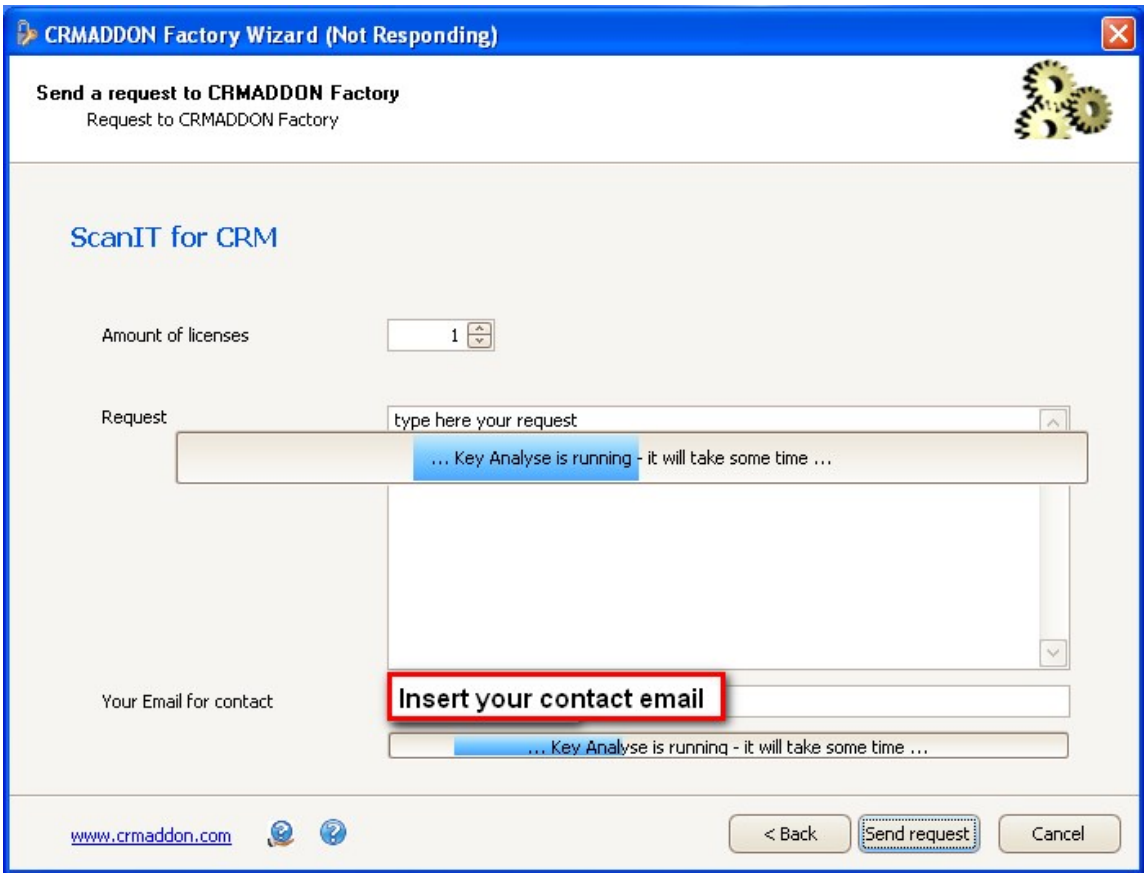
Order an Upgrade

Here you can order an upgrade of your ACT! version.
If you do not change your ACT! version and would like to get a software upgrade within the same version release, for example upgrade 2.3 version to 2.6. version, this will be done for free. However, if you would like to upgrade from 2.x.x version to 3.x.x version then you will need to purchase an upgrade. You will get the upgrade already starting at as low as 10% of the addon license cost. The support for the latest version is provided for free. In case you have an old version, you will need to purchase support units or upgrade to the latest version.

The following window will open after you select 'Order Upgrade' option:



Here you will need to provide your license key and email you are registered with in our system. To proceed further just click 'Next' button.


CRMADDON Factory Wizard (Not Responding)
Send a request to CRMADDON Factory
Request to CRMADDON Factory
ScanIT for CRM
Amount of licenses
1
Request
type here your request
... Key Analyse is running - it will take some time ...
Your Email for contact
Insert your contact email
... Key Analyse is running - it will take some time ...
www.crmaddon.com
< Back
Send request
Cancel

Here you will need to specify the amount of licenses, type your request and provide contact email, where you would like our support team to send you a reply. Then click **'Send request'** button to submit your request. To exit the Wizard just click **'Finish'** button on the next window.

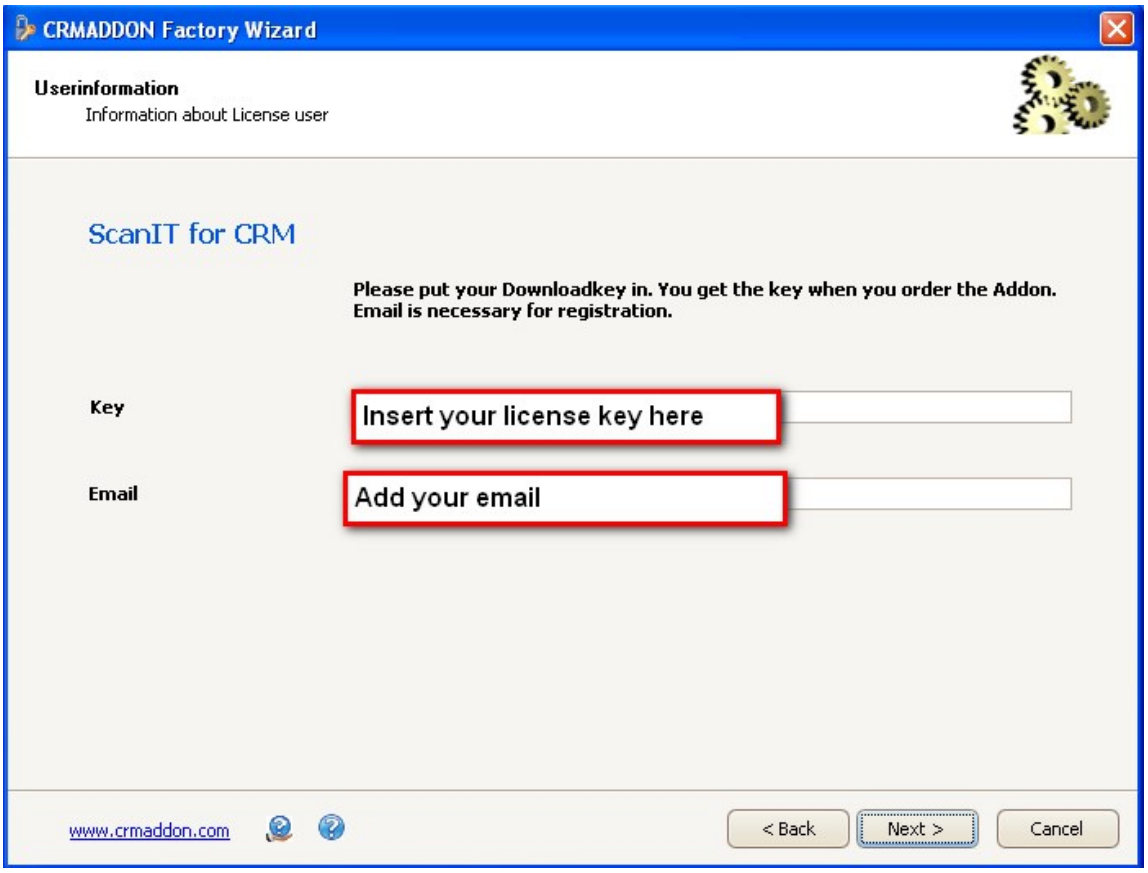
See also

Order license
Order an Update
Send Reset Request
Send Request

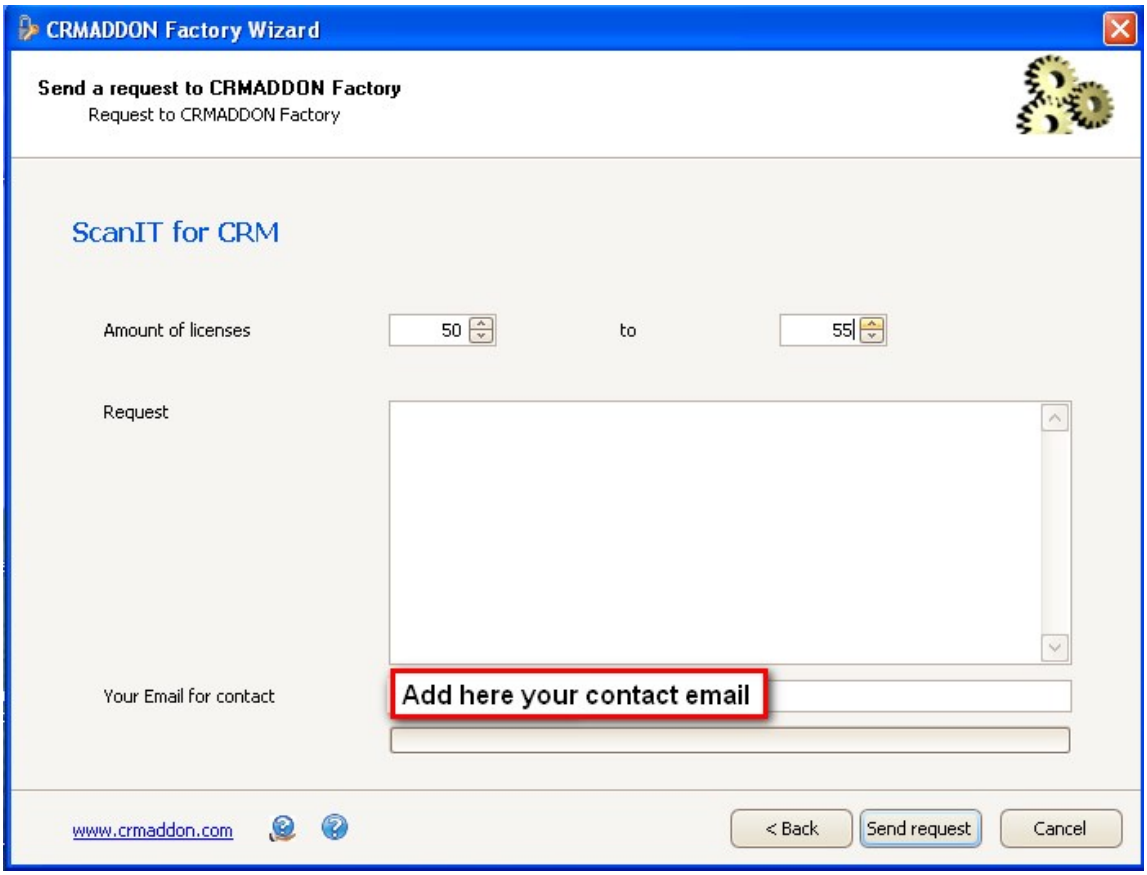
Home > Licensing > Send Request > Order an Update

Order an Update

Select this option if you would like to purchase more licenses of the addon.
On the following window specify your licence key and registered in our system email:



Specify here the number of licenses you would like to upgrade to, type your request and provide an email you would like to get a reply to.



To proceed click **'Send Request'** button and on the next window click **'Finish'** to exit the Wizard.

See also

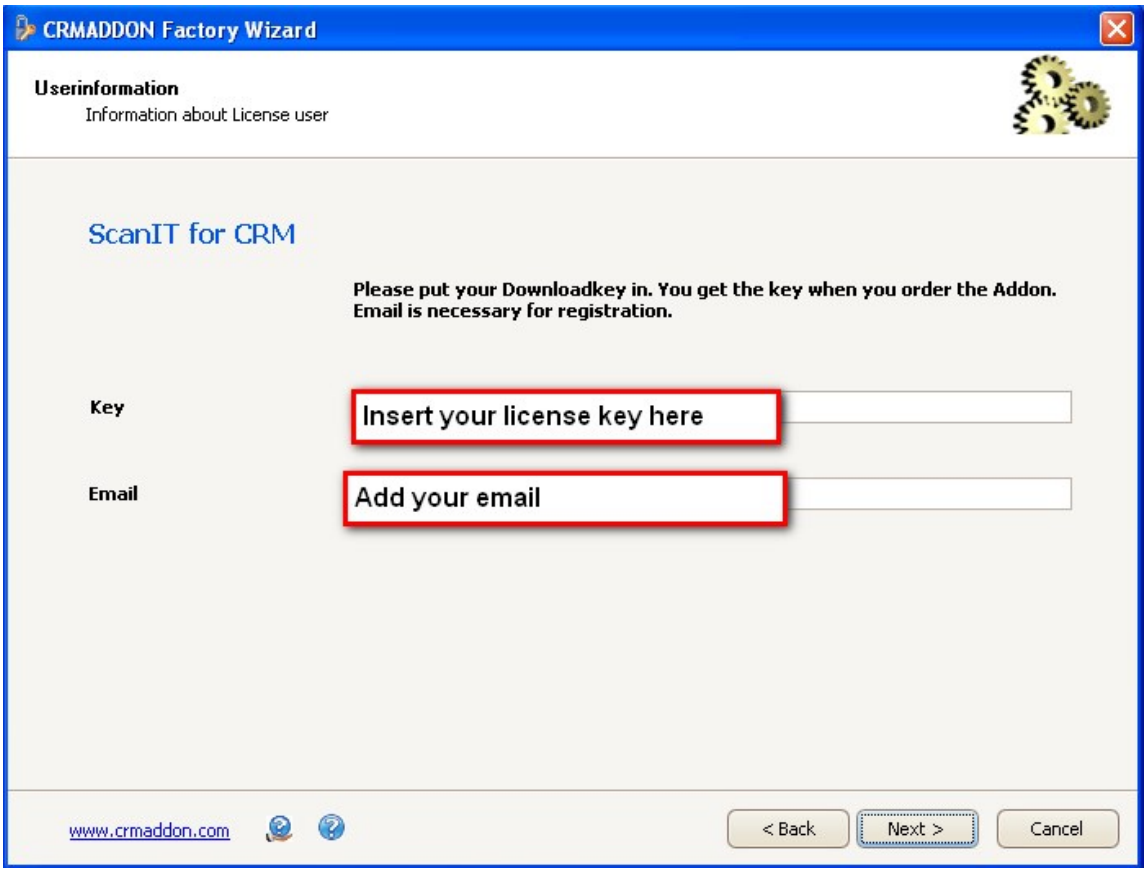
Order license
Order an Upgrade
Send Reset Request
Send Request

Home > Licensing > Send Request > Send Reset Request

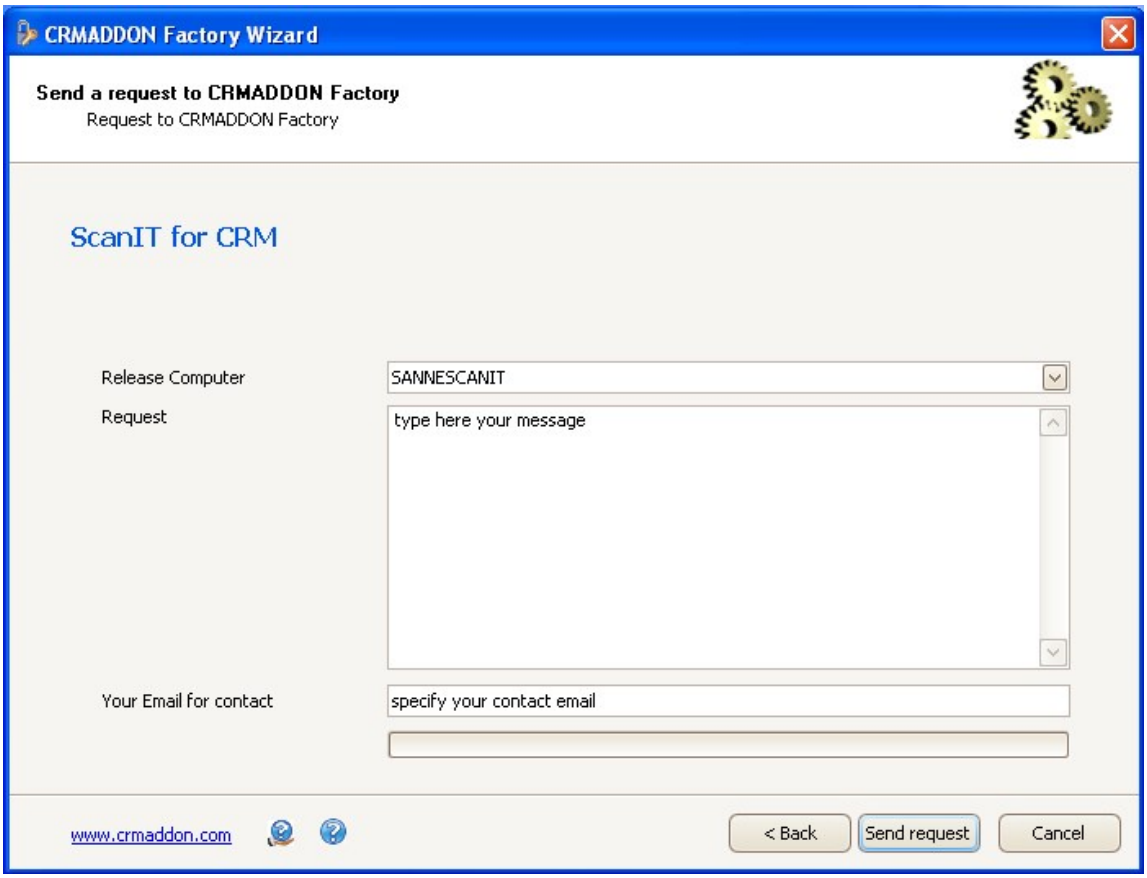
Send Reset Request

If you have already removed computers from licensing 2 times, then you will need to send us a reset request to reset your machine from licensing. You can do this by selecting 'Send reset request ' option.

On the following window you will need to specify your license key and registered in our system email:



On the next window you will need to select a computer you would like to release from the license from the drop down list. type in your request and add contact email.



Press **'Send Request'** button to submit your request.

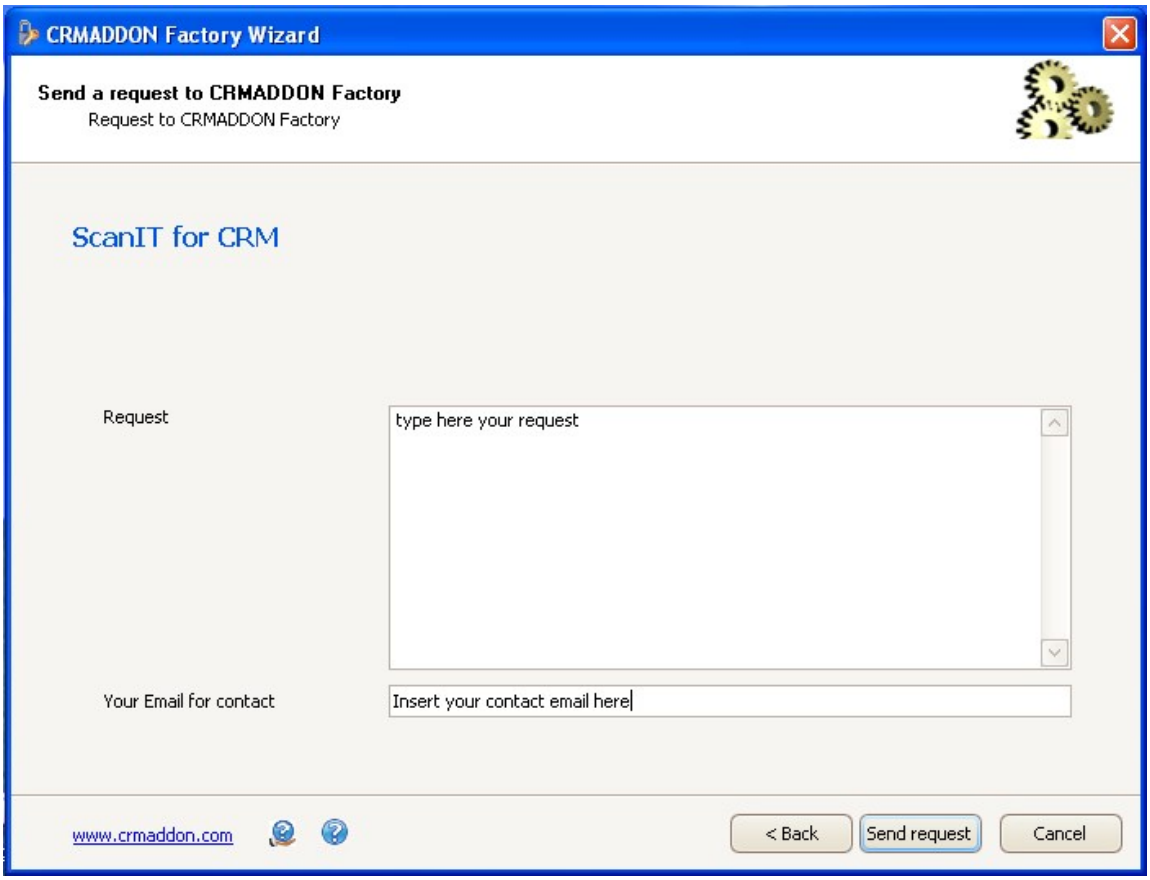
See also

Order license
Order an Upgrade
Order an Update
Send Request

Home > Licensing > Send Request > Send Request

Send Request

You can use this simple form to send us a request. Just type in your question and provide the email you would like us to reply to:



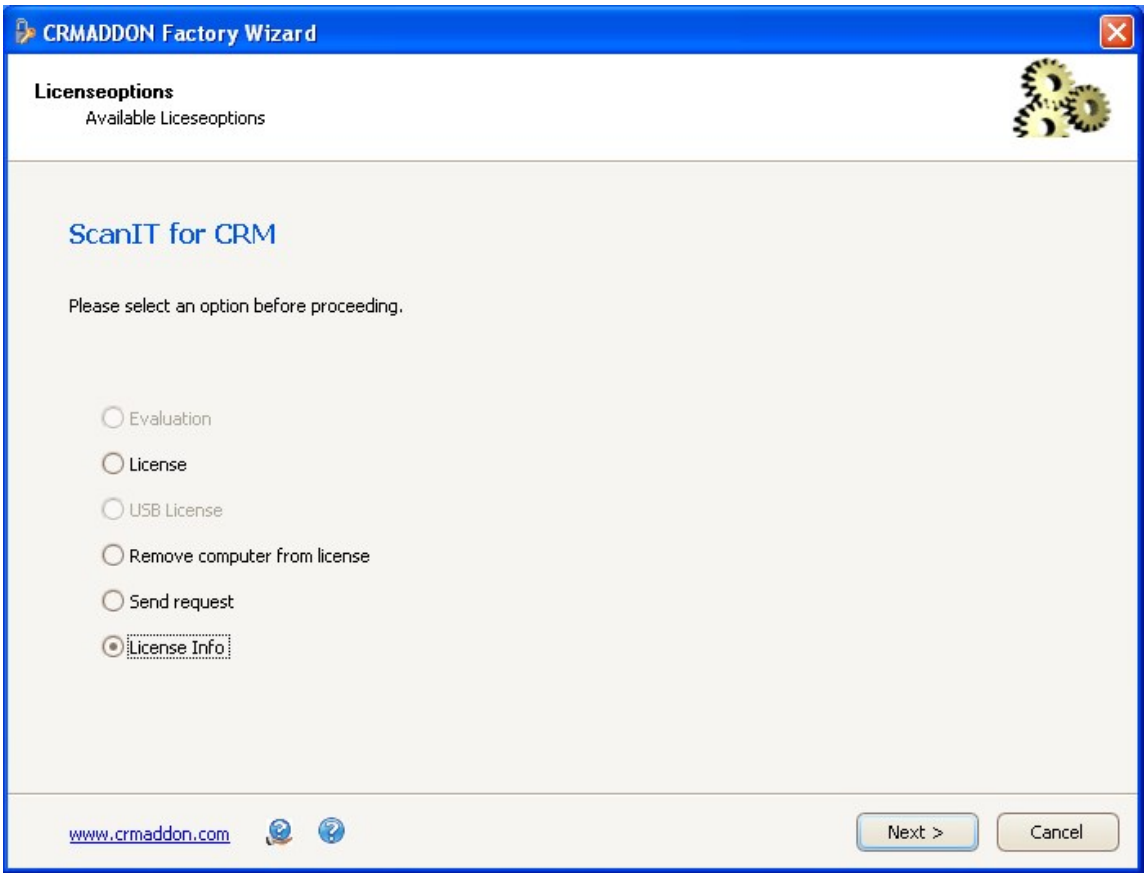
See also
Order license
Order an Upgrade
Order an Update
Send Reset Request

Home > Licensing > License Info

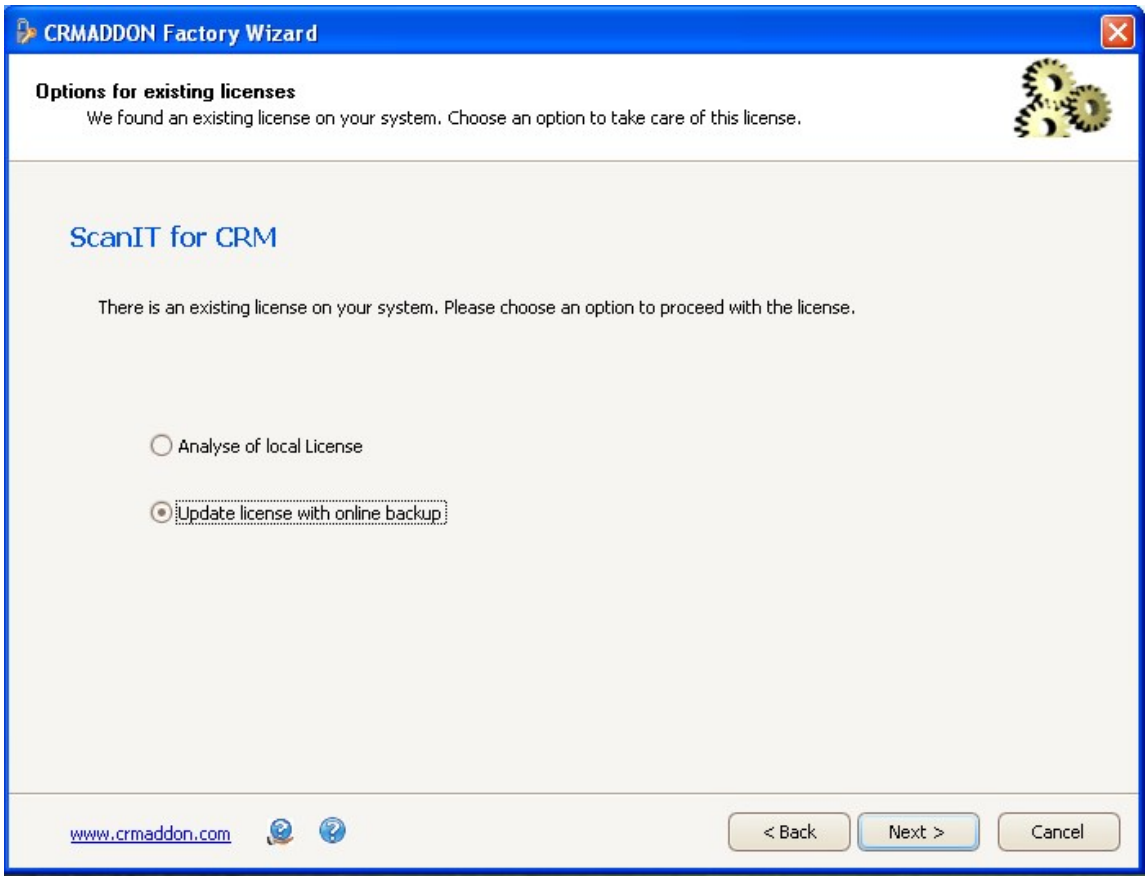
License Info

Here you can check the license code for your computer and for other machines where the license is installed. If the machine is in evaluation mode then 'Evaluation' option will be active, if there is a license specified for this machine, then 'Evaluation' will be inactive as shown on the screenshot below.

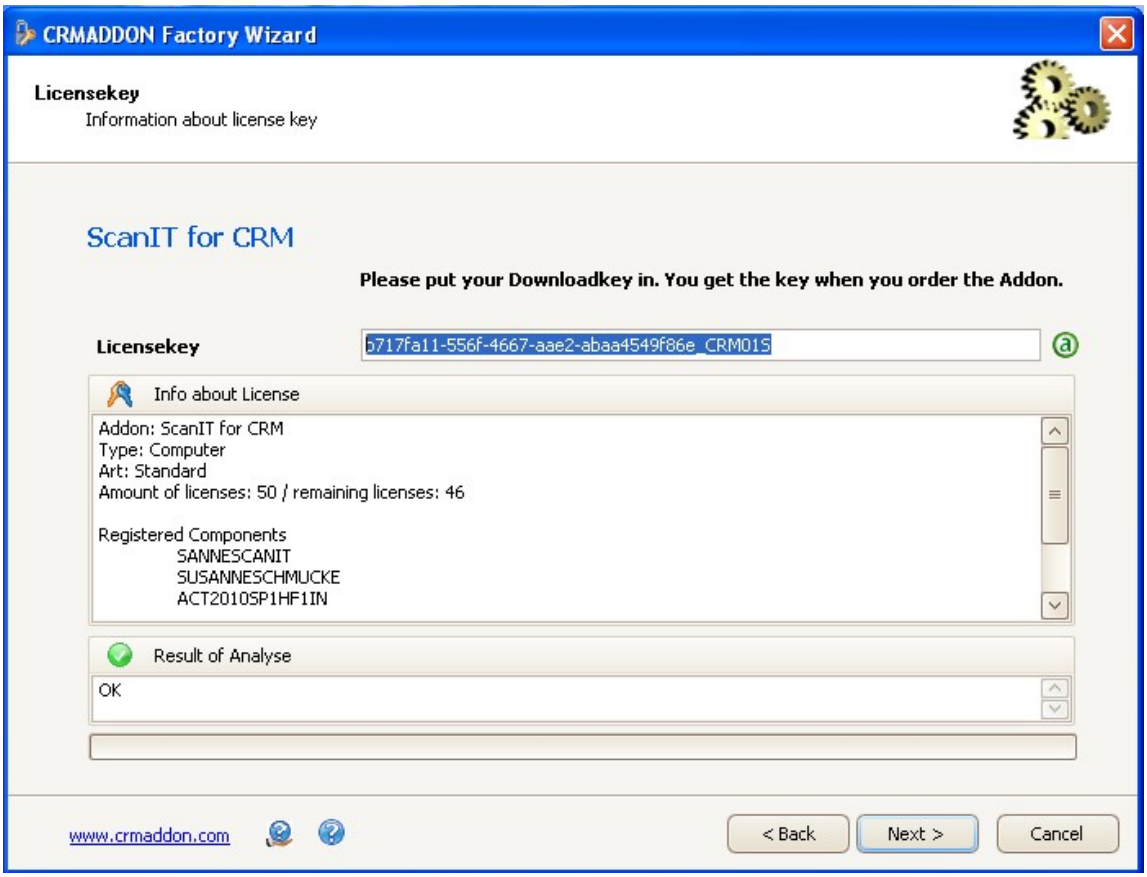
You need to select the following option on the License Wizard to check your license information:



On the next step you can select whether you would like to analyse the local license or update it. You need to select the first option '**Analyse the local license**' to get details about the license:


CRMADDON Factory Wizard
Options for existing licenses
We found an existing license on your system. Choose an option to take care of this license.
ScanIT for CRM
There is an existing license on your system. Please choose an option to proceed with the license.
Analyse of local License
Update license with online backup
www.crmaddon.com
< Back
Next >
Cancel

The following window will open:



On this window you will find information about the license owner, number of used and available licenses, what addon is the license for.

To proceed further you will need to click **'Next'** button and then **'Finish'** to close the License Wizard.

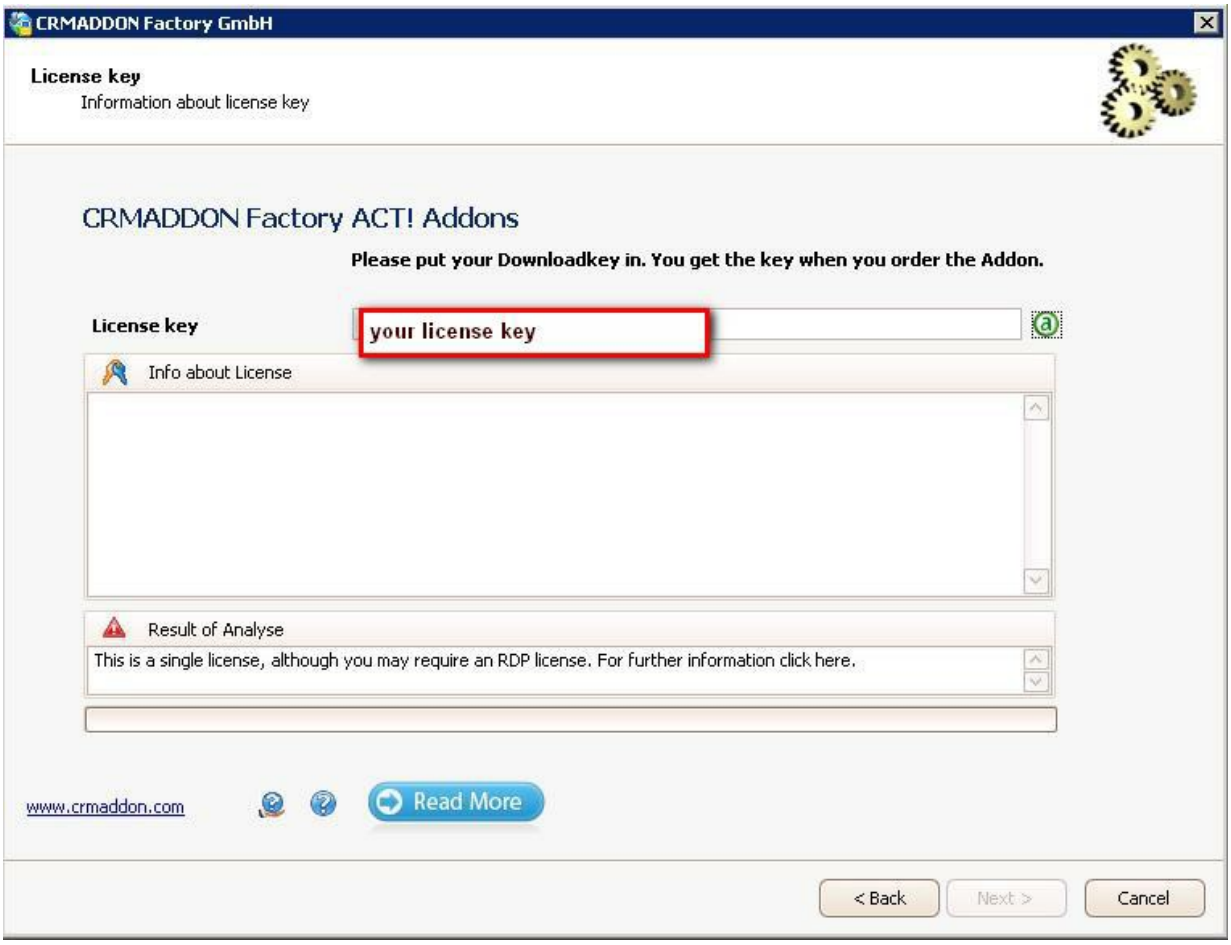
If you experience any issues and need our assistance, please click the following button at the bottom of the Wizard to create a support ticket

To open our User Manual, please click button at the bottom of the Wizard.

See also

Email License
Evaluation
License
Remove computer from license
Send Request

RDP License


CRMADDON Factory GmbH
License key
Information about license key
CRMADDON Factory ACT! Addons
Please put your Downloadkey in. You get the key when you order the Addon.
License key
your license key
Info about License
Result of Analyse
This is a single license, although you may require an RDP license. For further information click here.
www.crmaddon.com
Read More
< Back
Next >
Cancel

The license for all our addons is tied to a PC. This error appears if you try to use addon from another PC. So in case you'd like to use the addons via RDP, you need a client access license for each machine that accesses the tool via RDP.
We did see that lately different companies have installed our import/export on the server, and then everybody of the company logged in, and did imports via Remote (so it happened that we sold a single license, and did see support requests from 10 different persons for a single license). This is not the idea of a single user license, so we decided to allow only local access. If you/your customer wants to login via RDP from different PC´s he needs to purchase a RDP license for each PC that will access the server.

See also
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About Outreach|IT

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How to create email template
How to create Outreach Schemas
Report Designer
Report Editing Basics
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Support

System Requirements

Before installation, please ensure that you have administrator permission on the computer where you would like to install our software. Installation has been tested and it runs without any issues if you have admin rights on your machine. Please consult with your IT experts regarding your machine permissions. After you get the admin permission we can help you to install the software.

Operating system	Windows XP (32 bit) Windows Vista (32/64 bit) Windows 7 (32/64 bit) Windows 8 (32/64 bit)
Software	Act! 2008 or higher
Hardware	Intel Pentium 4 or higher At least 1 GB RAM 100 MB free hard disk space Network interface

See also
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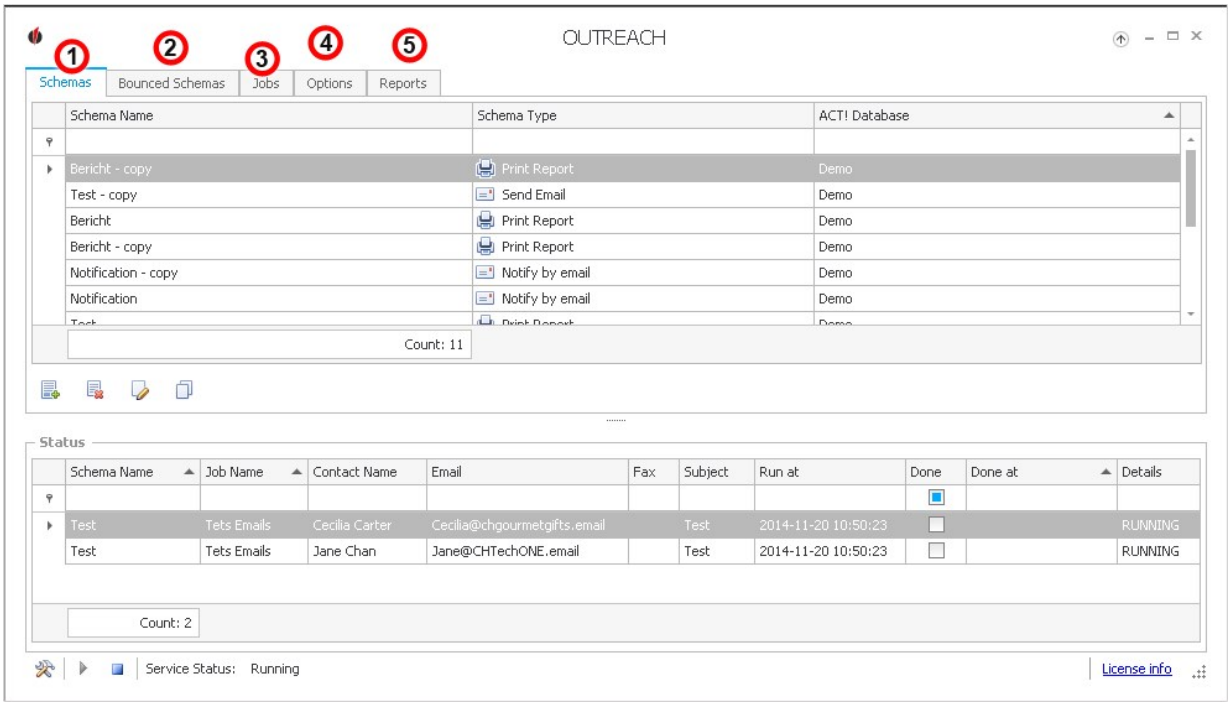
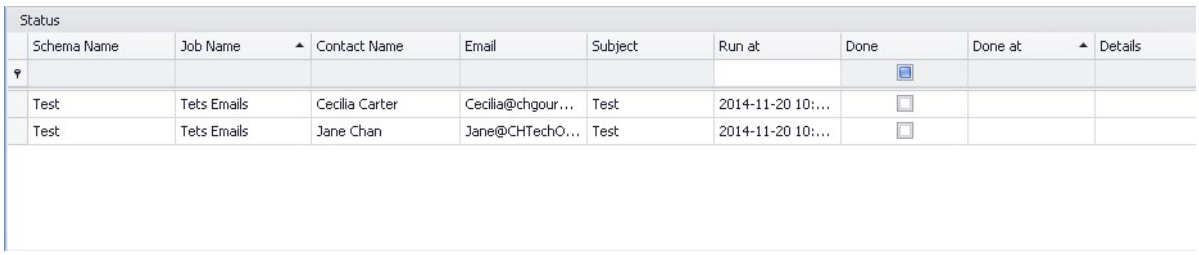
OutreachIT

Outreach|IT is a stand-alone program that is installed on your machine an can be started by clicking a desktop shortcut or opened from the windows start menu. With this tool you can create a schema for emails sending, parse bounced emails (Bounced Schema), create emails templates (reports) and set service tasks which will help to make emails sending automated (Jobs):



1. Schemas tab - the list of created schemas
2. Bounced emails tab - the tab where bounced emails schemas are displayed
3. Jobs tab - contains the list of jobs
4. Options tab - the tab where Outreach settings can be configured
5. Reports tab - the tab where email templates (reports) can be created

The following window shows tasks execution in Outreach.



See also

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Quick Start

In this section of our user manual we will provide the step by step instructions for beginners and explain how to set up your email marketing process up and running.

How to Sign in

How to create Outreach User

How to configure email accounts

How to create newsletter

See also

Welcome
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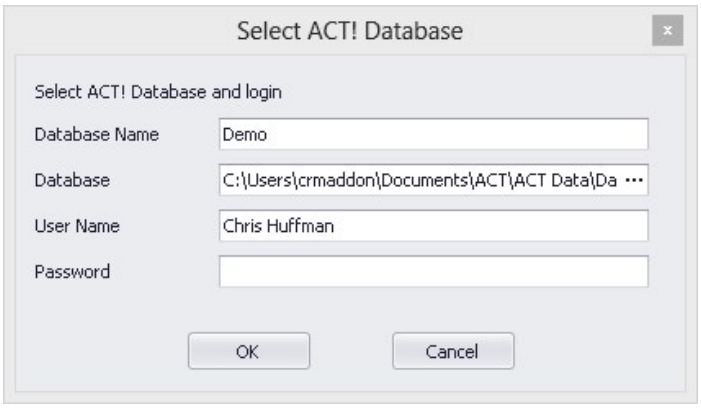
How to Sign in

When the OUTREACH is started the '**Connection**' window opens. In the dialog window you can choose the language for the interface of the OUTREACH|IT addon. To proceed further, please click '**Local Settings**'. When you click '**Local Settings**' for the first time, you will be offered to define your Act! database connection:



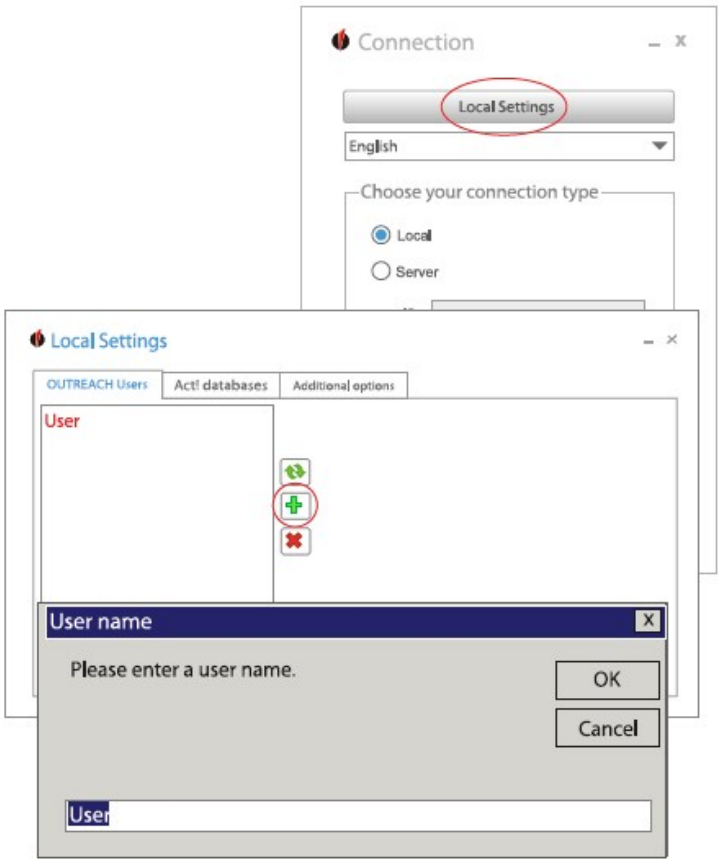
If you would like to test with Act! Demo database, please define a path to it and use the following login information: User Name - 'Chris Huffman' and leave the field 'Password' blank as demo database requires no password.

See also
How to create Outreach User
How to configure email accounts
How to create newsletter

Home > Quick Start > How to create Outreach User

How to create Outreach User

To access Outreach|IT application you'd need to define your user name which you will use to log into the Outreach|IT. After you have clicked '**Local Settings**' and defined your Act! database connection, please open '**Outreach Users**' tab, click **'+'** button there and define your user name.

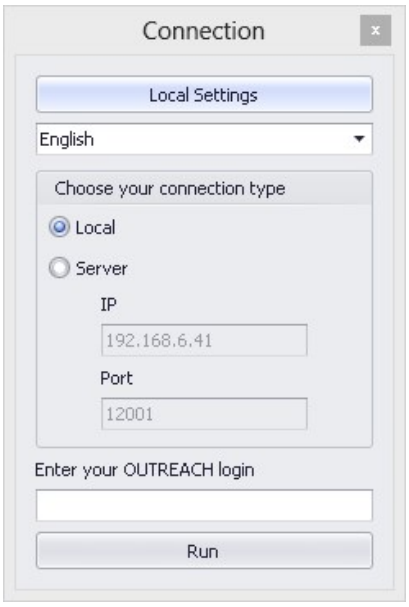


See also

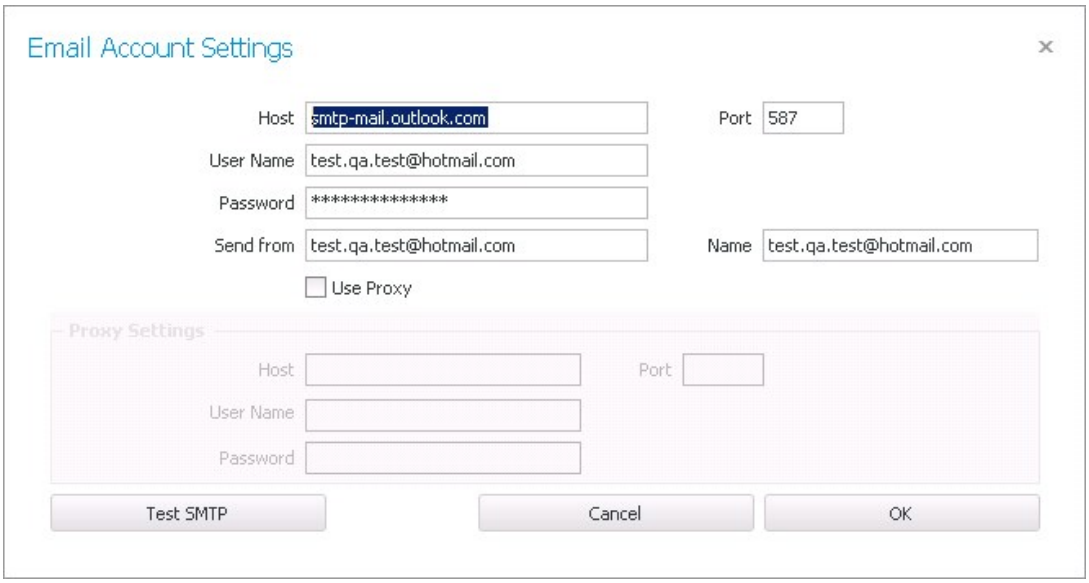
How to Sign in
How to configure email accounts
How to create newsletter

How to configure email accounts

After you have created a user, please log into the Outreach application with your user name. Before doing this you'd need to choose interface language (English or German) and check '**Local**' option under '**Choose your connection type**'. You can find more information about these settings here .



Now after you have logged into the application with your user name, it's time to define email sending options.Under **Options tab** click button and define your email account options. This email account will be used for sending outgoing emails to your customers:

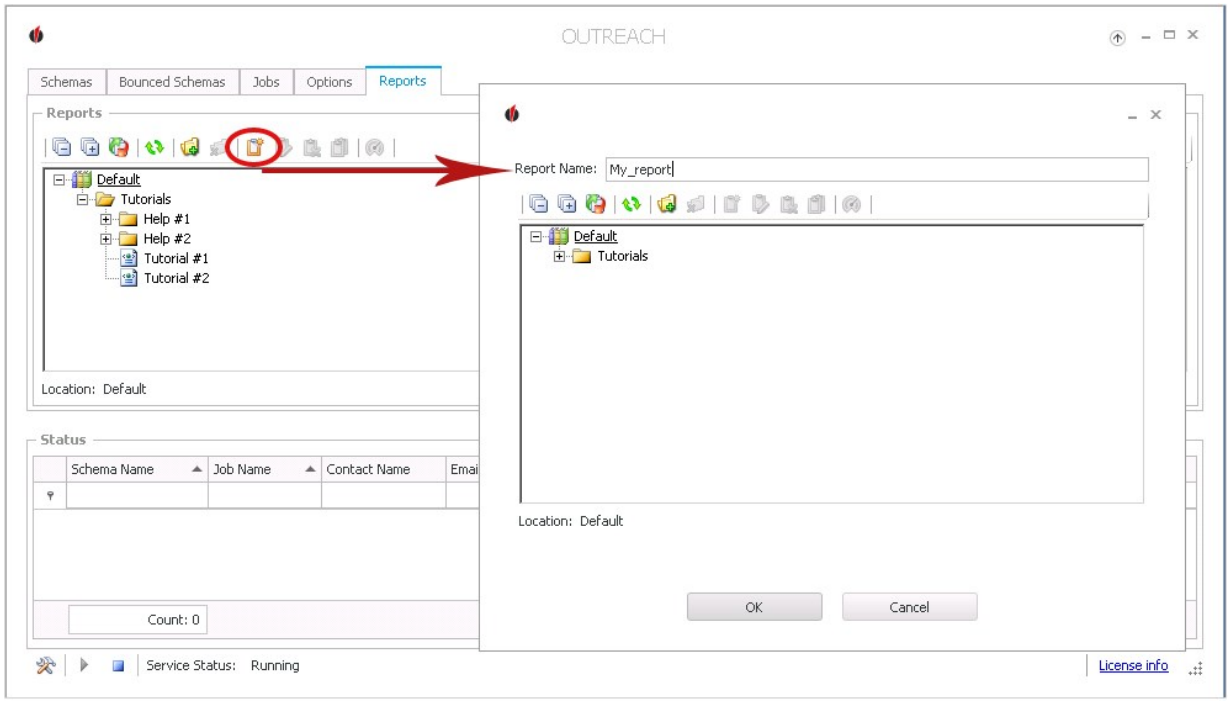


To ensure that your email settings are correct, please contact your mail server administrator

See also
How to Sign in
How to create Outreach User
How to create newsletter

How to create newsletter

For designing emails Outreach|IT application has a built in tool called Report Designer. This tools allows creating HTML newsletters and add there information from your Act! database fields. To start designing your email template, open Reports tab and click there button to create a new report.



In the tutorial folder you will find useful recommendations and examples of templates which will help you to design your email newsletters.

You will be asked to sign into your Act! database. Please enter your Act! login details to proceed further. Detailed instructions for designing Email template are available here .

See also
How to Sign in
How to create Outreach User
How to configure email accounts

How to Use OUTREACH|IT

Before you start working with the addon you'd nee to configure its settings which will allow you to send emails and create newsletters:

How to define OUTREACH|IT settings: in this section you will find information on how to launch the OUTREACH application first time, how to create your OUTREACH user, define Act! connection and insert details for connecting to the remote machine (if you work in such an environment).

How to define details for emails sending and other options : in this section you will find detailed description on how to define settings for outgoing emails, save attachments and add fax server data.

Before sending your emails you need to create templates for your newsletters. This can be done with help of our report designers. We offer two types of report designers - simple one for beginners and professional for advanced users. For using both designers basic understanding of HTML, FTP is required as you'd need to add links and images to your newsletters.

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How to define Outreach settings

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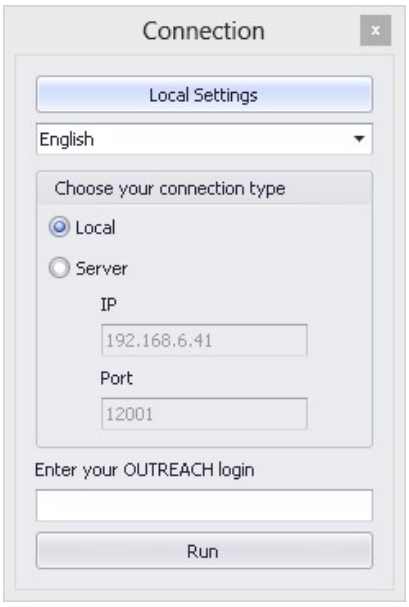
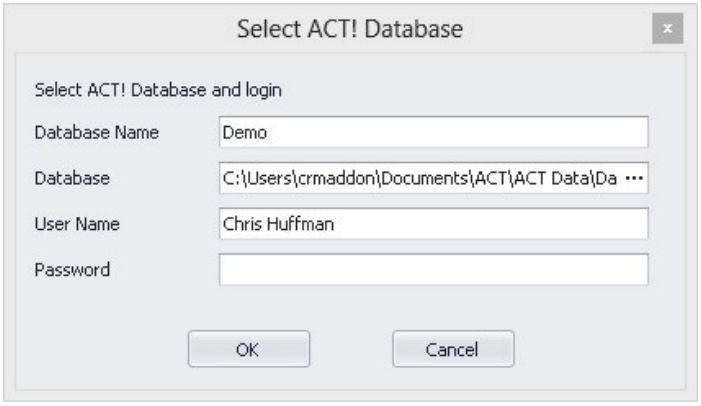
How to define Outreach settings

When you start the Outreach application, the following dialog appears:



If you do not have a user name, please follow '**Local Settings**' and create your user profile there. If you already have a user name, then enter it under '**Enter your OUTREACH login**' and press '**Run**' to proceed. Outreach is designed to be used on a server and therefore has an option to create several user profiles to manage different Act! data bases. You'd also need to select an option if it is used locally or on a server.

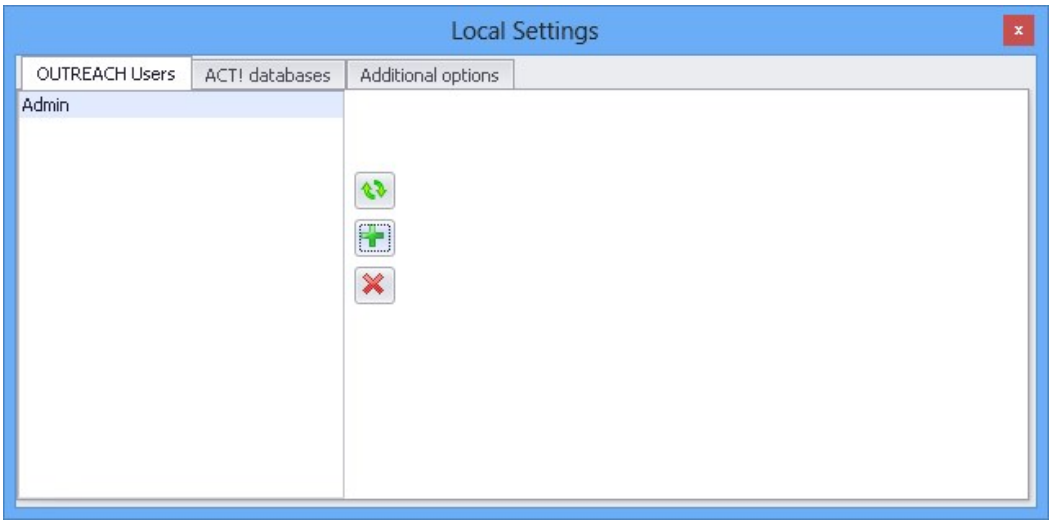
When you click '**Local Settings**' for the first time, you will be offered to define your Act! database connection:



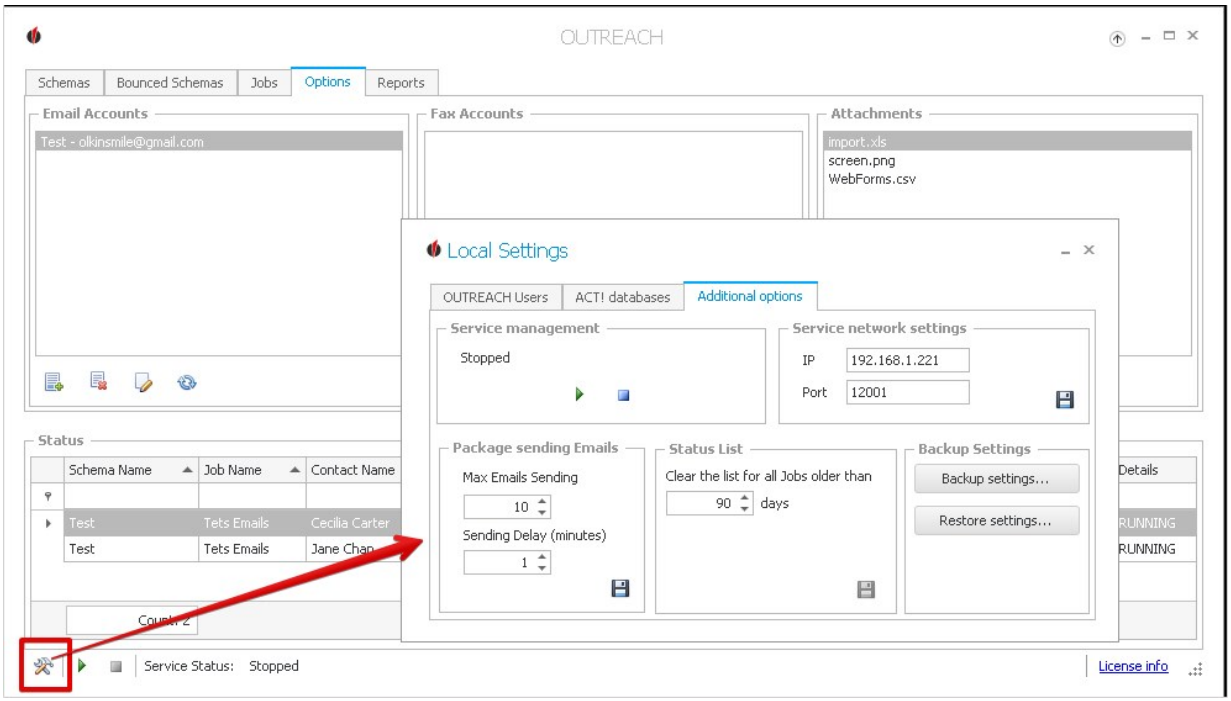
Tip: *In case you do not wish to test Outreach with your live database, you can take advantage of available Act! Demo Database. It has standard login as Chris Huffman without password.*

Then you'll be able to proceed further and create your user profile.

Local Settings window has the following look:



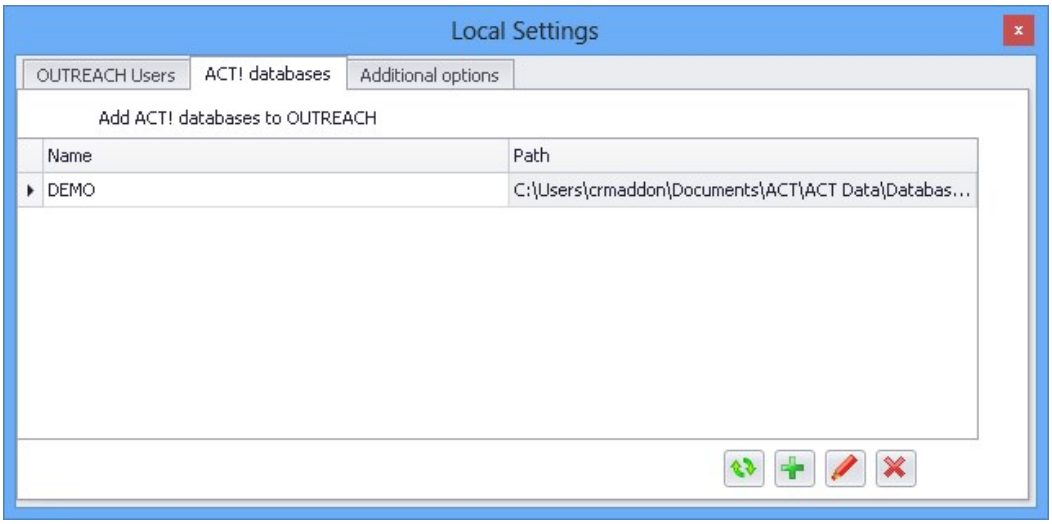
If you have already defined all your schema settings and need to make a backup or make other changes, you can access '**Local Settings**' dialog directly from your OUTREACH|IT main mask by clicking special icon in the bottom left corner:



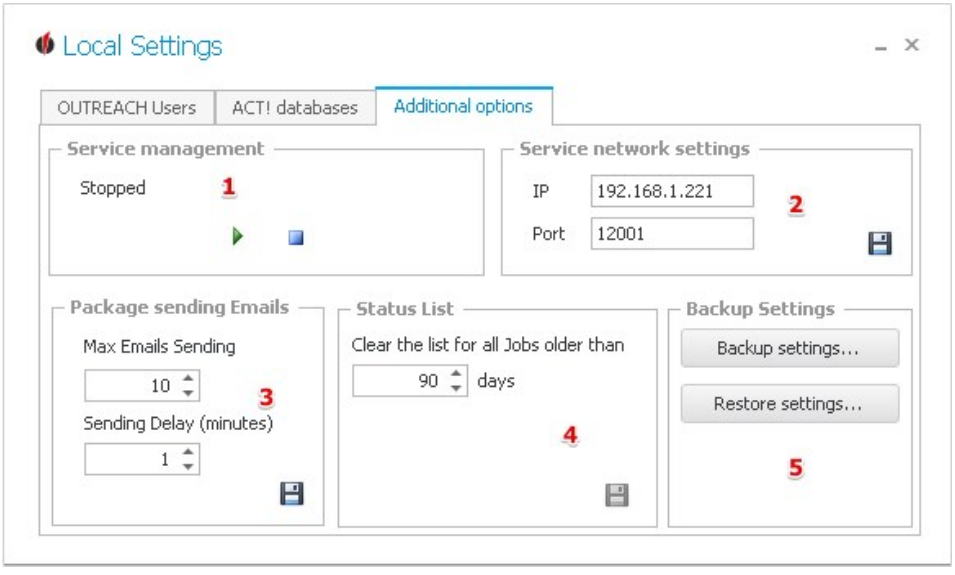
To create a user, click button and specify the user name you prefer:

Please be advised that the user name is **case sensitive**.

In case you would like to update the path to your database, remove it or add another database, please follow **Act! databases** tab



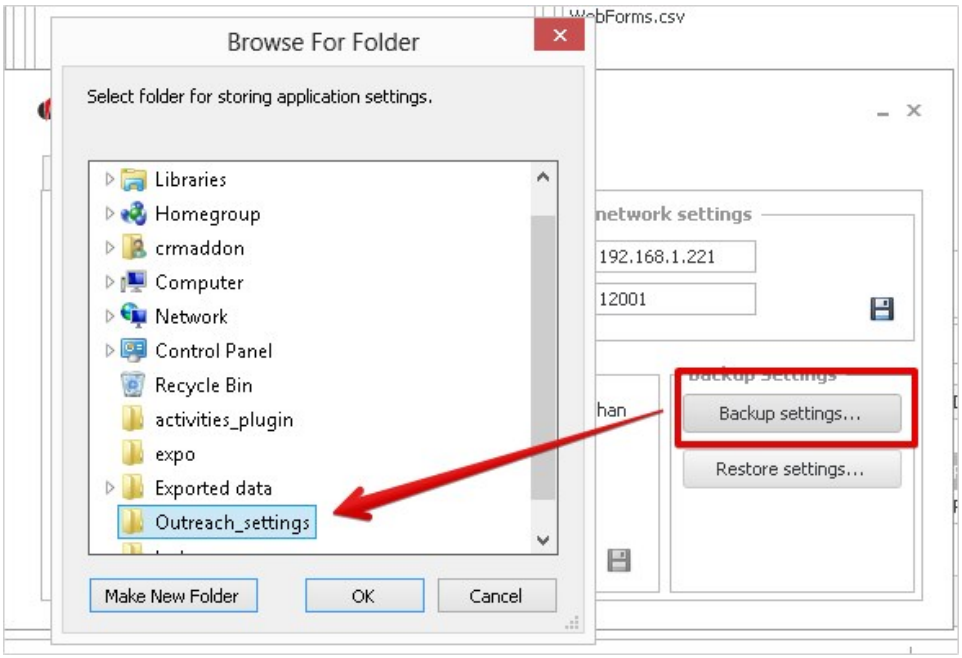
More settings can be configured on the '**Additional Options**' dialog.



1. Under **Service management**, you can start or stop the Outreach service or just check its status. Outreach service is responsible for performing your Outreach jobs. For example if you set emails sending, this process will not start if service is stopped.
2. **Service network settings**. These fields should be filled out in case you use Outreach in the environment where Act! database is installed on a remote machine. If you have it installed on the same machine where your Act! database is installed then you do not need to fill those fields out.
3. **Package sending emails**. In order not to overload your mail server, you can set the application to send your emails in packets and limit those packets. In addition to this you can define a delay between packets sending.
4. Under **Status list** you can specify the time period after the list of performed jobs will be cleared.

5. **Backup Settings**. Here you can **save** and **restore** your Outreach settings. This option is useful if you need to transfer your Outreach addon to another computer and save all its settings intact.

To backup your OUTREACH|IT settings you need to click '**Backup settings**' button and define the path to the folder where those settings will be stored:

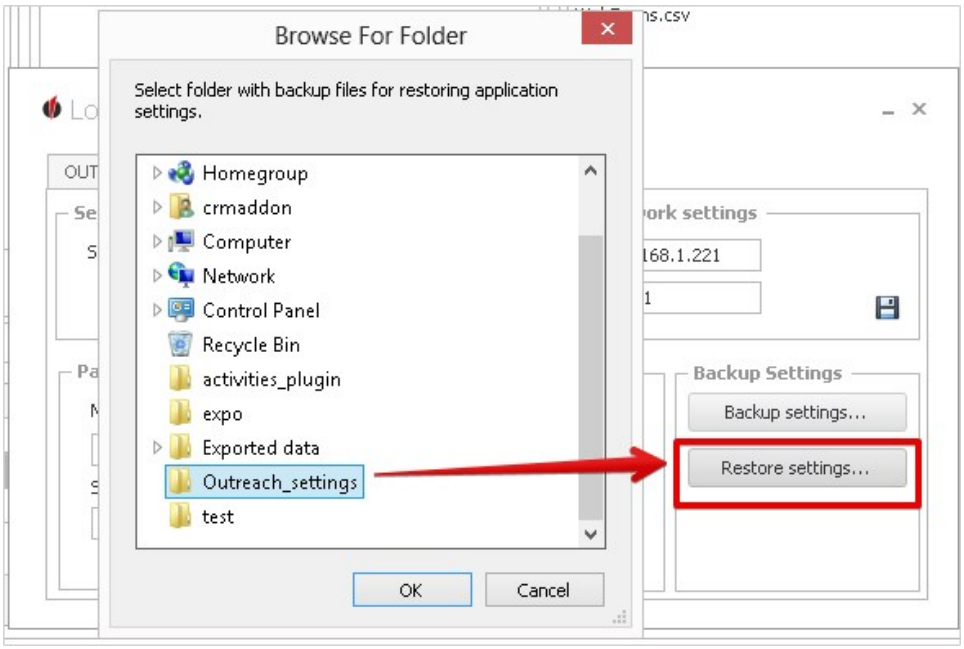


The backup contains the following elemets:

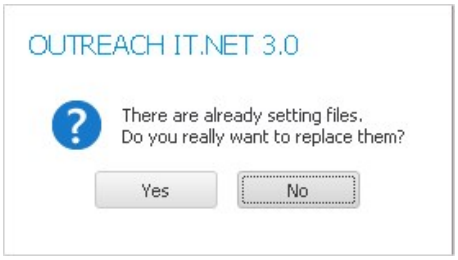
- OUTREACH|IT SQL DB backup file - OutreachDB.bak
- OUTREACH|IT schemas, bounced schemas, jobs, options (email accounts, fax accounts, attachments), reports, OUTREACH|IT users (from the Local settings window), path to Act! databases (from the Local settings window), and the file Outreach_bakup.arc.

While restoring all those files are restored (unzipped) to corresponding locations and DB is restored from the OutreachDB.bak file into a DB Server that is currently configured in the OUTREACH|IT by an administrator/user.

To restore your OUTREACH|IT settings you need to click '**Restore settings**' button and define the path to the folder where your Outreach settings are stored:



In case you already have the same settings in your OUTREACH|IT application you will be offered to overwrite existing settings or leave them unchanged. If you click 'No' then only database will be restored.



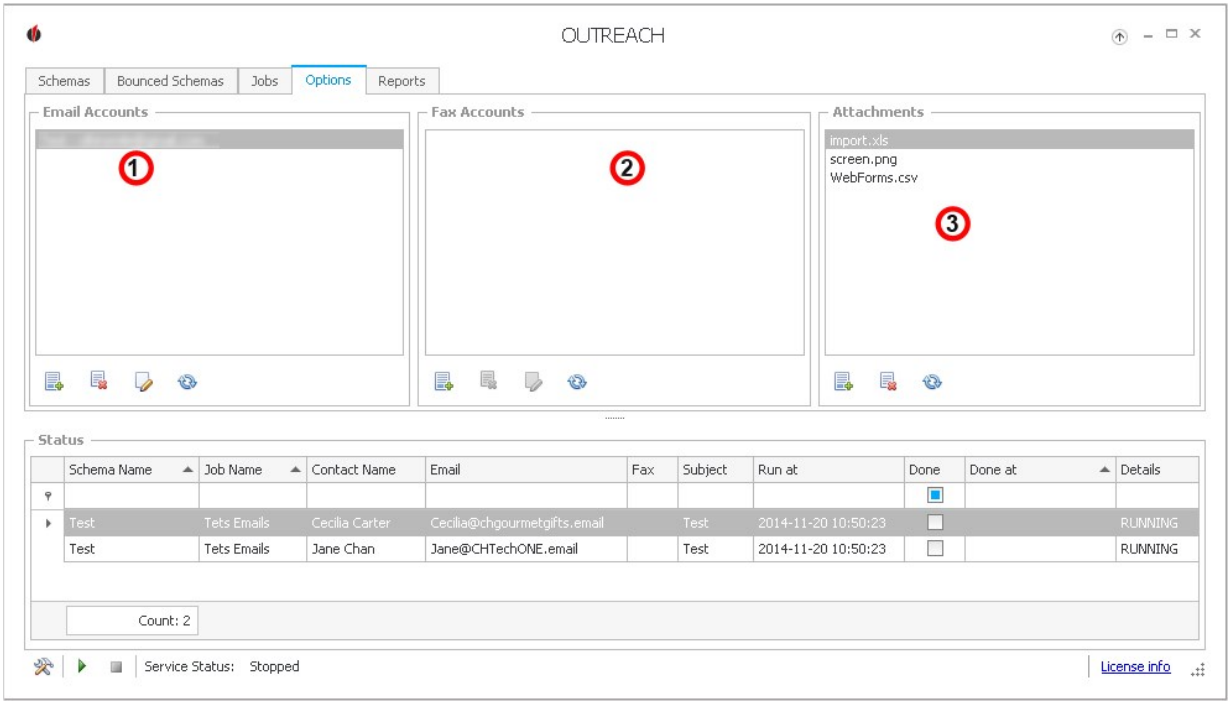
Please note! To apply new settings you'd need to restart your Outreach application

See also

Outreach Options

Outreach Options

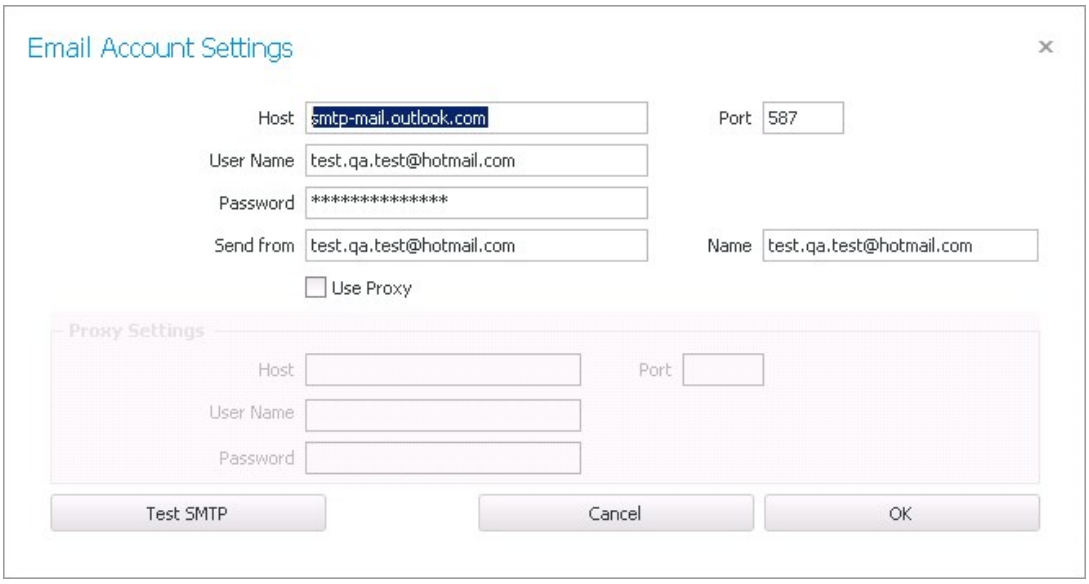
If you have logged in with your user name for the first time, then before starting with schemas you'd need to click button and define your Outreach Options:



1. Email Accounts - in this section of options you can define your email connection configuration. Using this information Outreach application will initiate emails sending.
2. Fax Accounts – in this section of options you can define your Relay Fax account in case you'd need to use the schema for faxes sending .
3. Attachments - if you wish to send attachments along with your newsletters you can add them in this options section.

Email Accounts

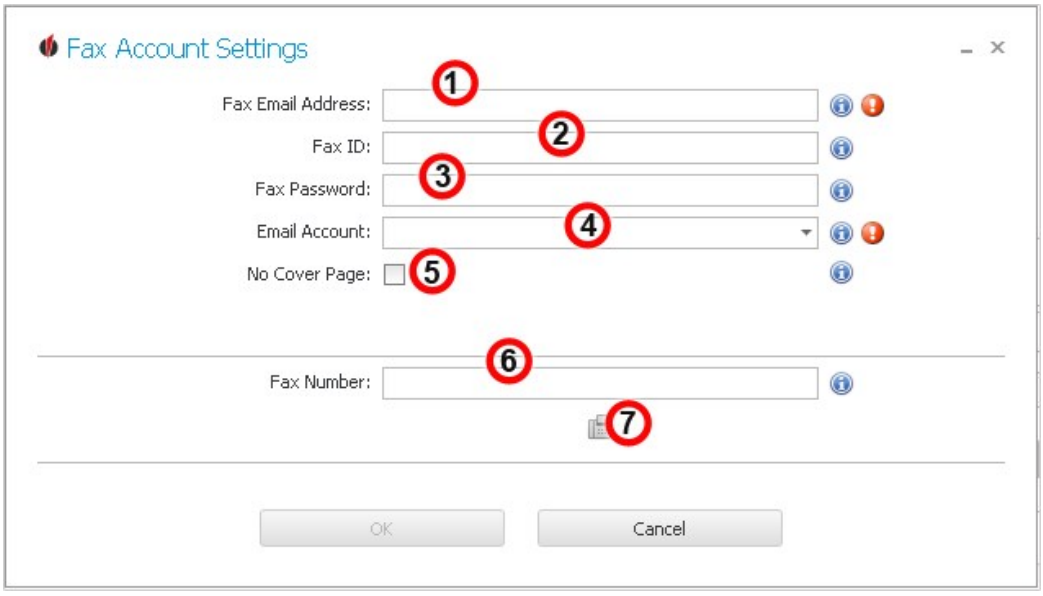
First of all you'd need to set your **outgoing email connection** and email account. Click button to proceed:



Fill out the fields on the above form and click '**Test SMTP**', you will be notified if the check has been preformed successfully and will also get a test email. To save settings press '**OK**'.

Fax Accounts

In this section you can define the settings of your RelayFax. Please fill out the following form with your fax information and store your settings:



1. The email account monitored by your RelayFax
2. The ID which is used when sending a fax. This information is transmitted to the receiving fax machine
3. Fill this field out if your RelayFax is configured to use a password

4. Fax sender email account
5. Checking this option is you would like to prevent RelayFax from generating a dynamic cover page when sending faxes.
6. Specify the number of fax recipient for RelayFax testing purpose. This number will be used only for testing
7. Click this button to send a test fax

Attachments

By clicking on the button you can add attachments here. These attachments will be attached to your email newsletters.

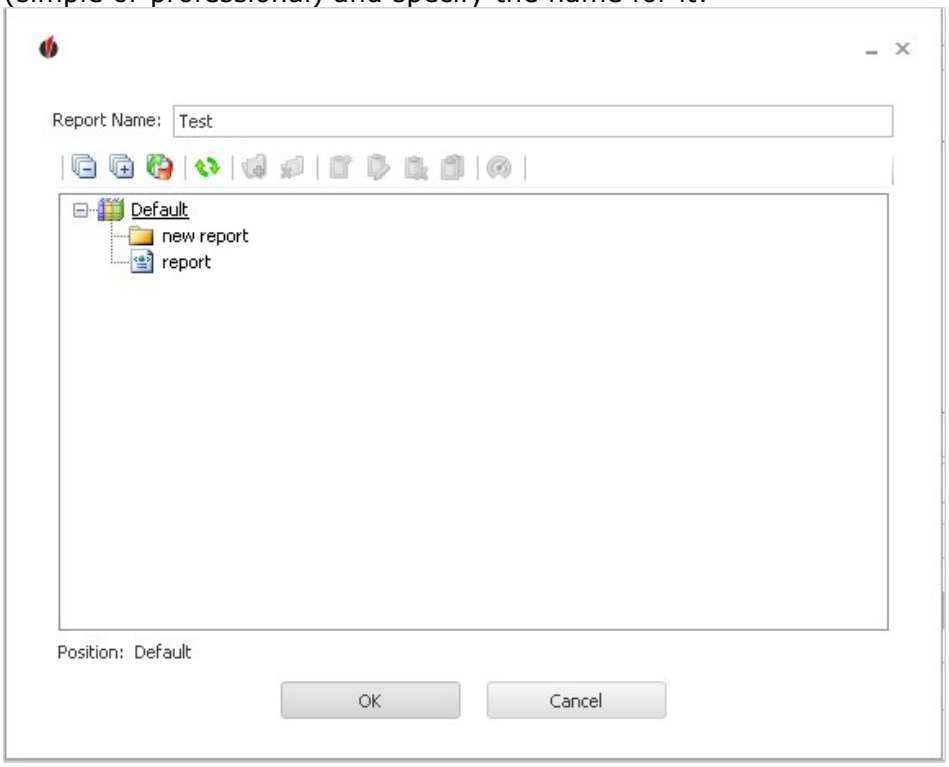
See also
How to define Outreach settings

Creating Reports

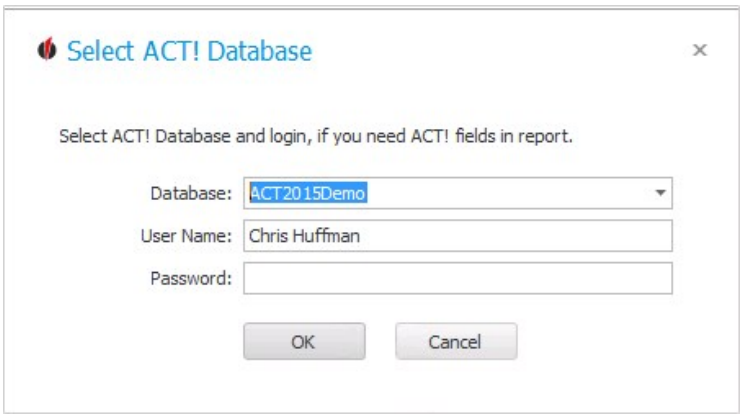
Creating Reports

Reports are email templates which you can create for your newsletters with help of the Report Designer. You can display in those reports information from your Act! database, add media, rich text formatting, etc. Outreach|IT has two types of report designers available. They are simple and professional report designers. More information about using simple report you will find here . Details about using professional reports you will find here .

If you would like to create an email template, click button, choose the type of report (simple or professional) and specify the name for it:

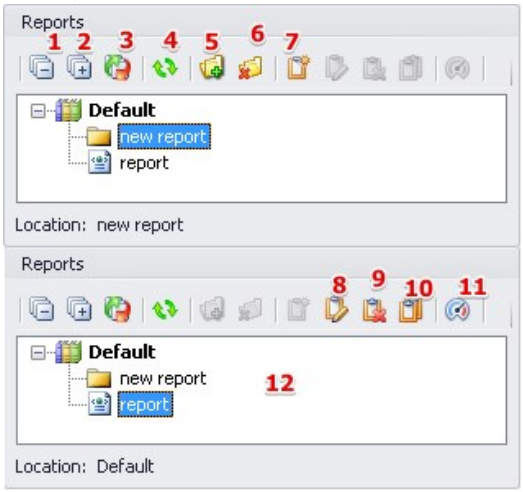


You will be offered to use your Act! database fields for the report:



Then you will be able to create a report using our built in Report Designer tool.

Created emails templates you can choose in the Reports window. You can put them to groups if necessary



1. Expand all nodes with files and folders
2. Collapse all nodes with files and folders
3. Auto expand all nodes
4. Refresh the list
5. Add a folder
6. Remove a folder
7. Create a report
8. Edit the report
9. Remove the report
10. Copy the report
11. Test the report
12. List of reports and folders with reports

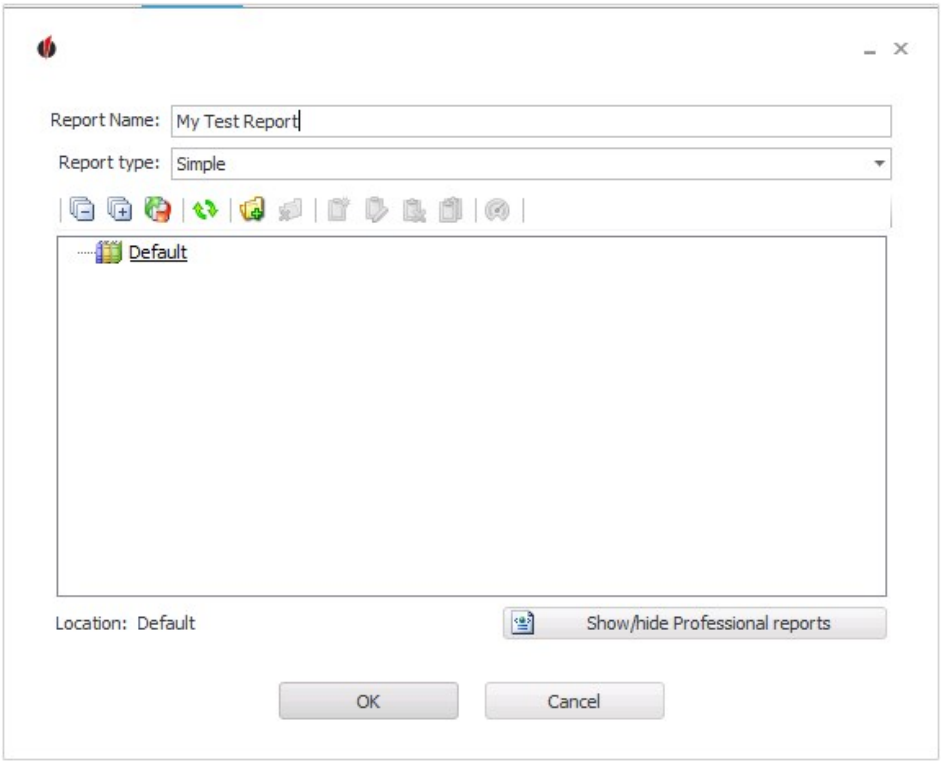
Attachments

See also
Welcome
Outreach Installation

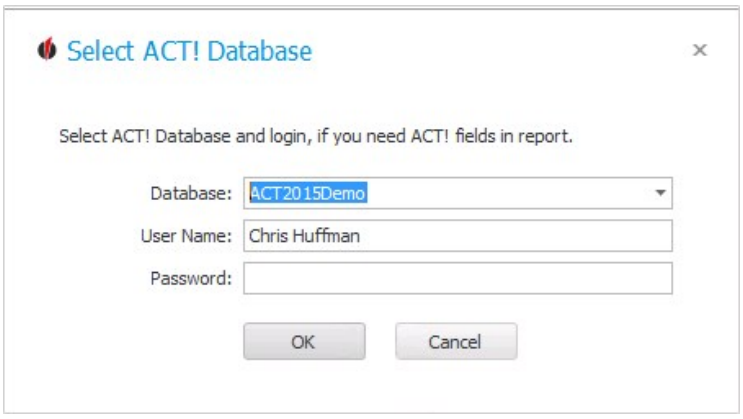
Email Marketing with Outreach|IT
Licensing
RDP License
System Requirements
About Outreach|IT
Quick Start
How to Use OUTREACH|IT
Outreach Settings
How to create email template
How to create Outreach Schemas
Report Designer
Report Editing Basics
Create Reports
Report Designer Reference
Preview and Print Reports
Support

Simple Report

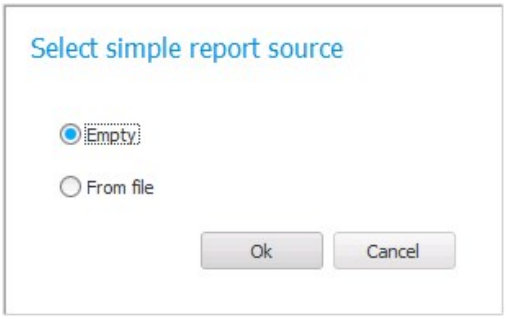
Simple Report Designer allows you to create HTML email newsletter by using basic editing tools. This type of report designer is for users who would like to create simple HTML newsletter fast and without additional technical details. After clicking button please choose **Simple** as a type of the report on the following dialog window:



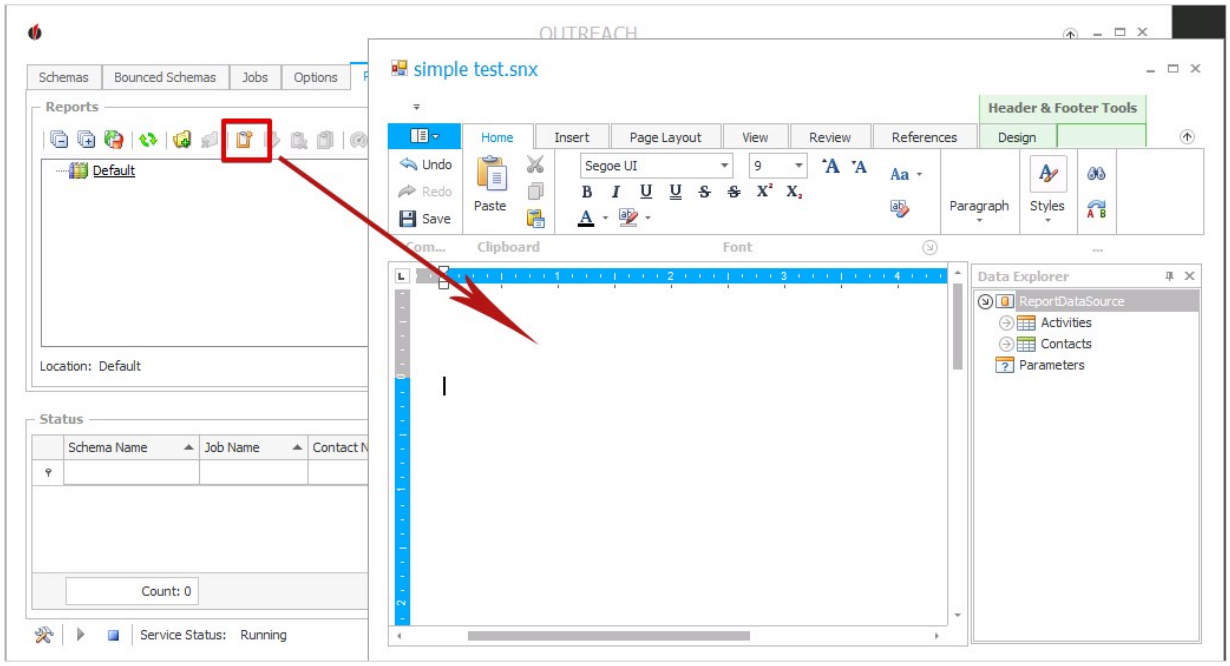
Then, please define connection details for your Act! database:



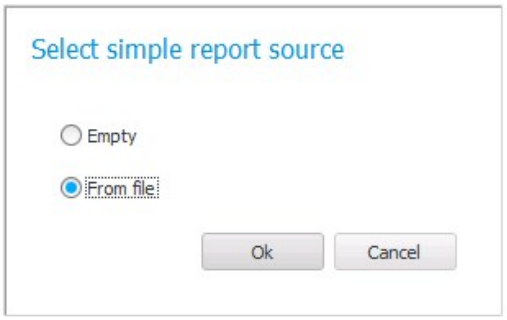
Simple report can be either created from scratch or loaded from an existing HTML file.



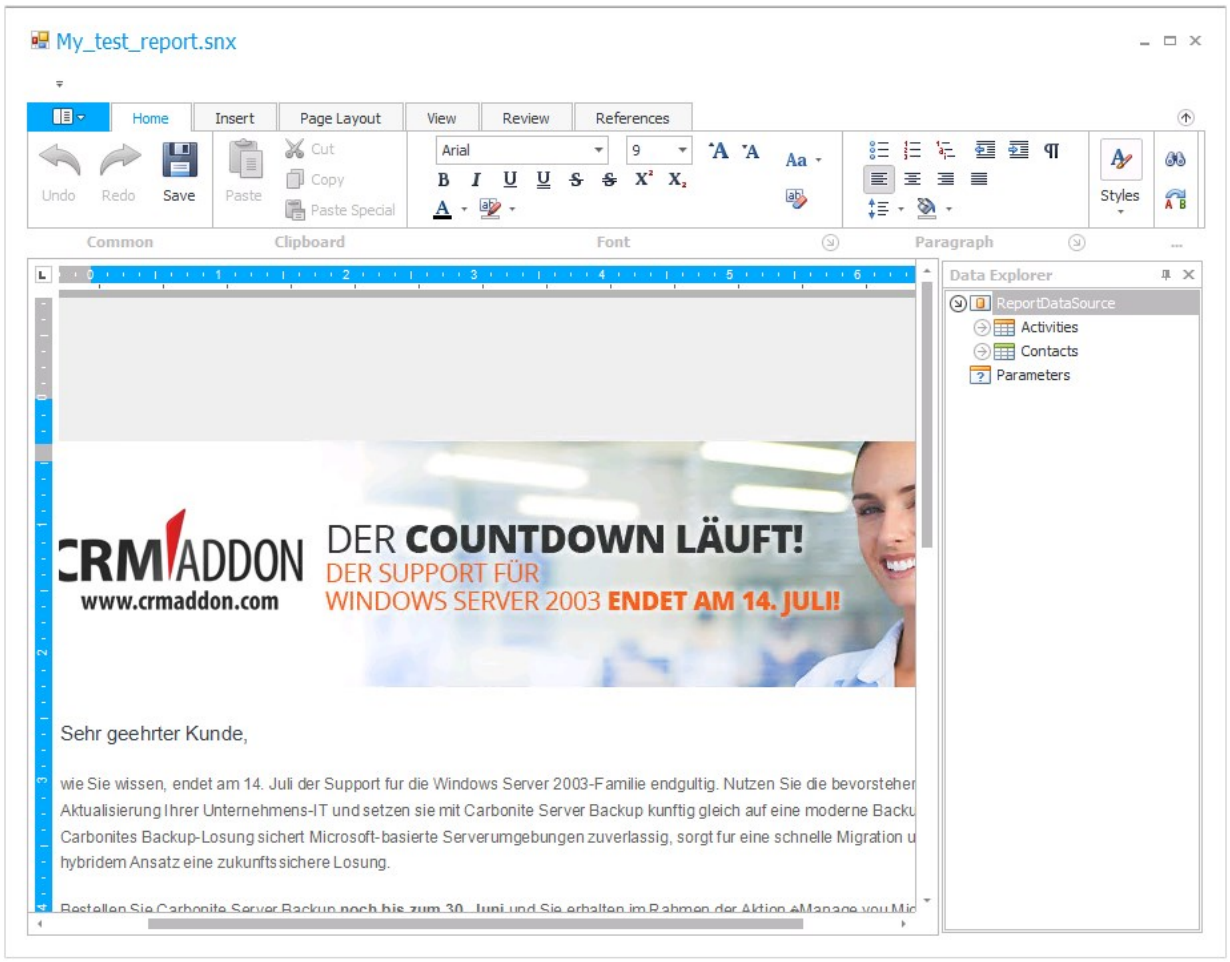
Choose '**Empty**' if you would like to create a newsletter from scratch. After this a report designer window will come up:



However, if you already have some ready made template, you can upload it by selecting '**From file**' option:



After choose a source file for your email newsletter template it will be loaded to the simple report designer:



It can be edited there if necessary and then you should save changes in it.

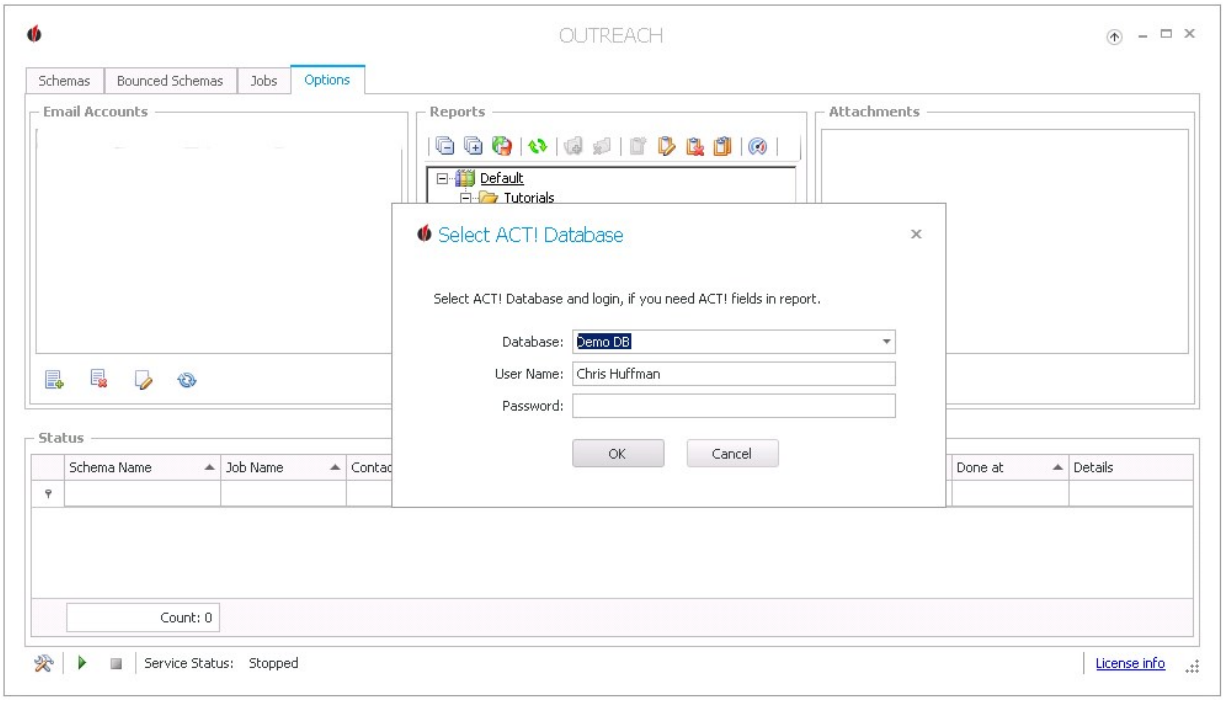
See also

How to create email template

After configuring the basic settings, you can start with creating your email template which will be sent to your customers via OUTREACH|IT addon.

How to use Report Designer

With help of report designer you will be able to create HTML newsletter. Then you will be able to configure OUTREACH|IT addon to send bulk mails or print your letters out.



We strongly recommend taking advantage of our tutorials. To open them follow Tutorials folder and open a template by clicking on this button or just double click on Tutorials.

TIP:
Before creating an original newsletter, test everything with tutorial.

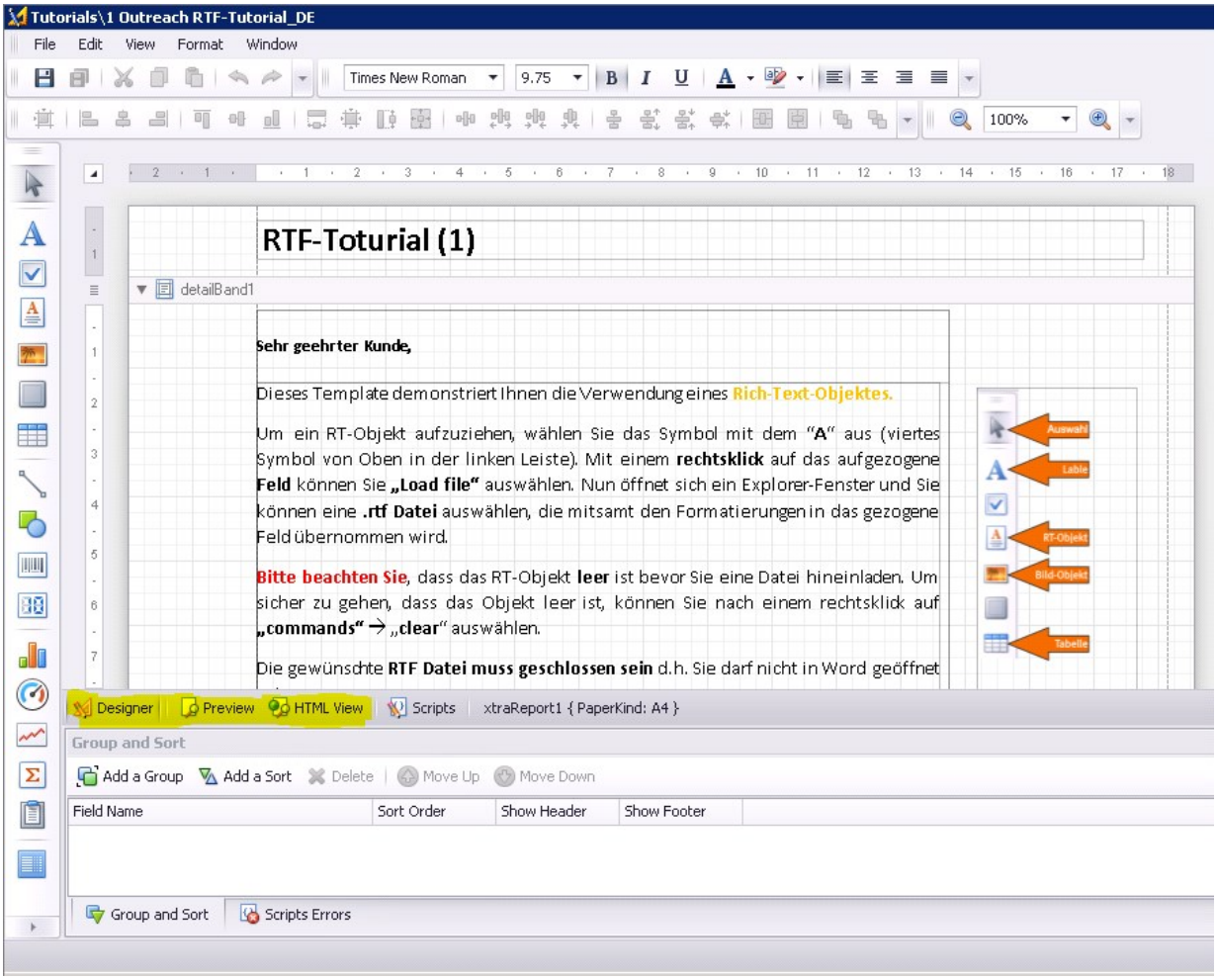
You can log into your Act! demo database to see how Act! fields are added to the report template. To log into Act! demo database, please use Chris Huffman as user name, without any password. In case you got errors, please ensure you provided the correct login data.

After successful login, please follow recommendations in the tutorials.

- In the designer you can update the data.
- User 'Preview' option to see how your newsletter looks like
- User HTML view to check if the template looks properly in HTML format and

does not generate any errors.

IMPORTANT: *send yourself a test email after creating your first template. Each email client (gmx, web, yahoo, etc.) processes emails in a different manner. Check your test email in different email clients to ensure everything is ok with it.*


Tutorials\1 Outreach RTF-Tutorial_DE
File Edit View Format Window
Times New Roman
9.75
100%
RTF-Toturial (1)
detailBand1
Sehr geehrter Kunde,
Dieses Template demonstriert Ihnen die Verwendung eines Rich-Text-Objektes.
Um ein RT-Objekt aufzuziehen, wählen Sie das Symbol mit dem "A" aus (viertes Symbol von Oben in der linken Leiste). Mit einem rechtsklick auf das aufgezogene Feld können Sie „Load file" auswählen. Nun öffnet sich ein Explorer-Fenster und Sie können eine .rtf Datei auswählen, die mitsamt den Formatierungen in das gezogene Feld übernommen wird.
Bitte beachten Sie, dass das RT-Objekt leer ist bevor Sie eine Datei hineinladen. Um sicher zu gehen, dass das Objekt leer ist, können Sie nach einem rechtsklick auf „commands" → „clear" auswählen.
Die gewünschte RTF Datei muss geschlossen sein d.h. Sie darf nicht in Word geöffnet
Auswahl
Lable
RT-Objekt
Bild-Objekt
Tabelle
Designer
Preview
HTML View
Scripts
xtraReport1 { PaperKind: A4 }
Group and Sort
Add a Group
Add a Sort
Delete
Move Up
Move Down
Field Name
Sort Order
Show Header
Show Footer
Group and Sort
Scripts Errors

If you need to use calculation fields in your email template, you can add them by following detailed instruction available here.

If you need to add some fields to your email template from your Act! database, click on the right panel and move them from the "Fields list" section with help of drag-and-drop.

See also

Welcome
Outreach Installation
Email Marketing with Outreach|IT
Licensing

RDP License
System Requirements
About Outreach|IT
Quick Start
How to Use OUTREACH|IT
Outreach Settings
Creating Reports
How to create Outreach Schemas
Report Designer
Report Editing Basics
Create Reports
Report Designer Reference
Preview and Print Reports
Support

See also

Welcome
Outreach Installation
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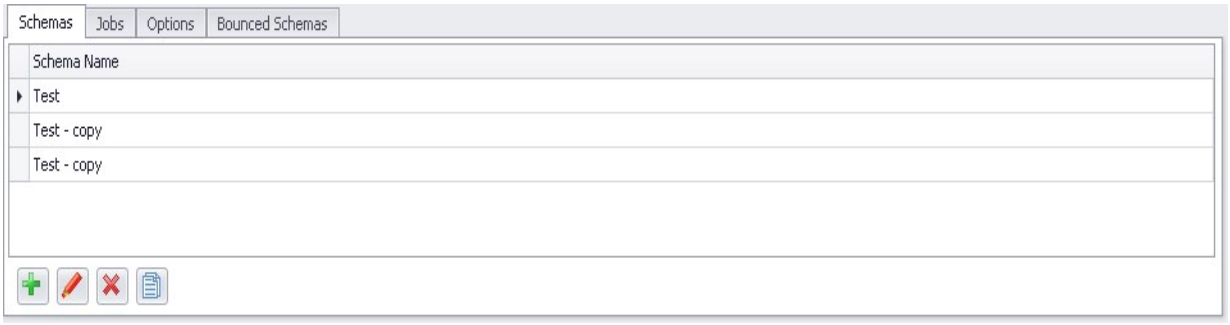
Report Designer Reference
Preview and Print Reports
Support

Schemas

Within Schema section you can create a schema for outgoing emails. A convenient built in Wizard will help you to configure all needed settings. To create a Schema, please click button:



- adds a new schema
- opens an existing schema for editing
- removes selected schema
- copies selected schema

See also

Welcome
Outreach Installation
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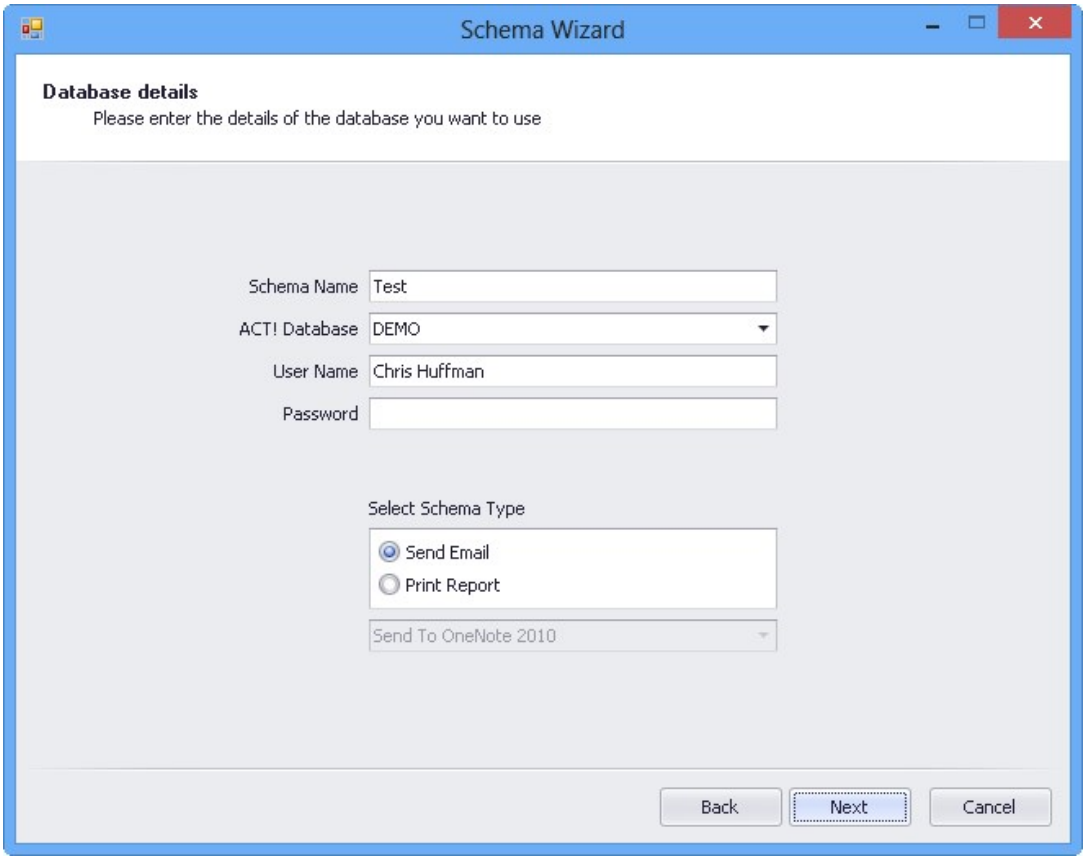
About Outreach|IT
Quick Start
How to Use OUTREACH|IT
Outreach Settings
Creating Reports
How to create email template
Report Designer
Report Editing Basics
Create Reports
Report Designer Reference
Preview and Print Reports
Support

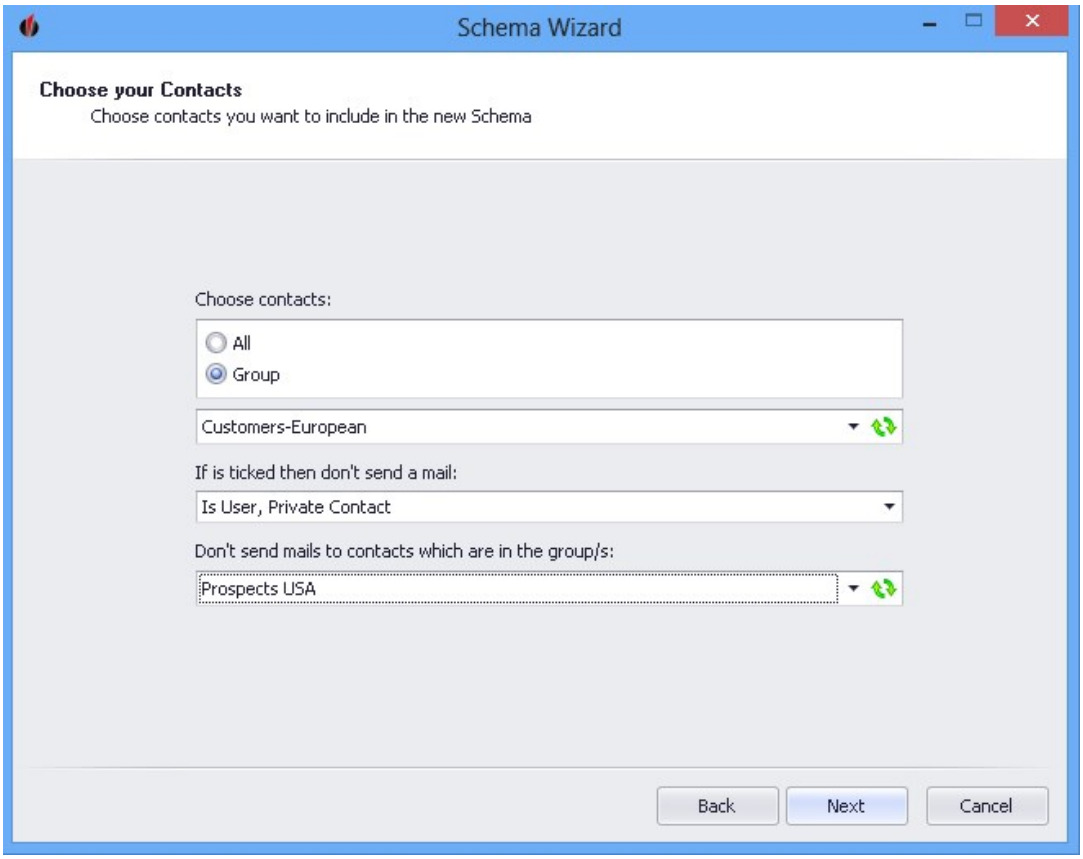
Schema Send Email Wizard

With Schema Wizard you can configure your Outreach Schema by filling out Wizard fields. This example is for '**Send Email**' schema type.

Specify on the following Window a path to your Act! database and your database details and click "Next" button to log into the database you would like to work with and to proceed further:



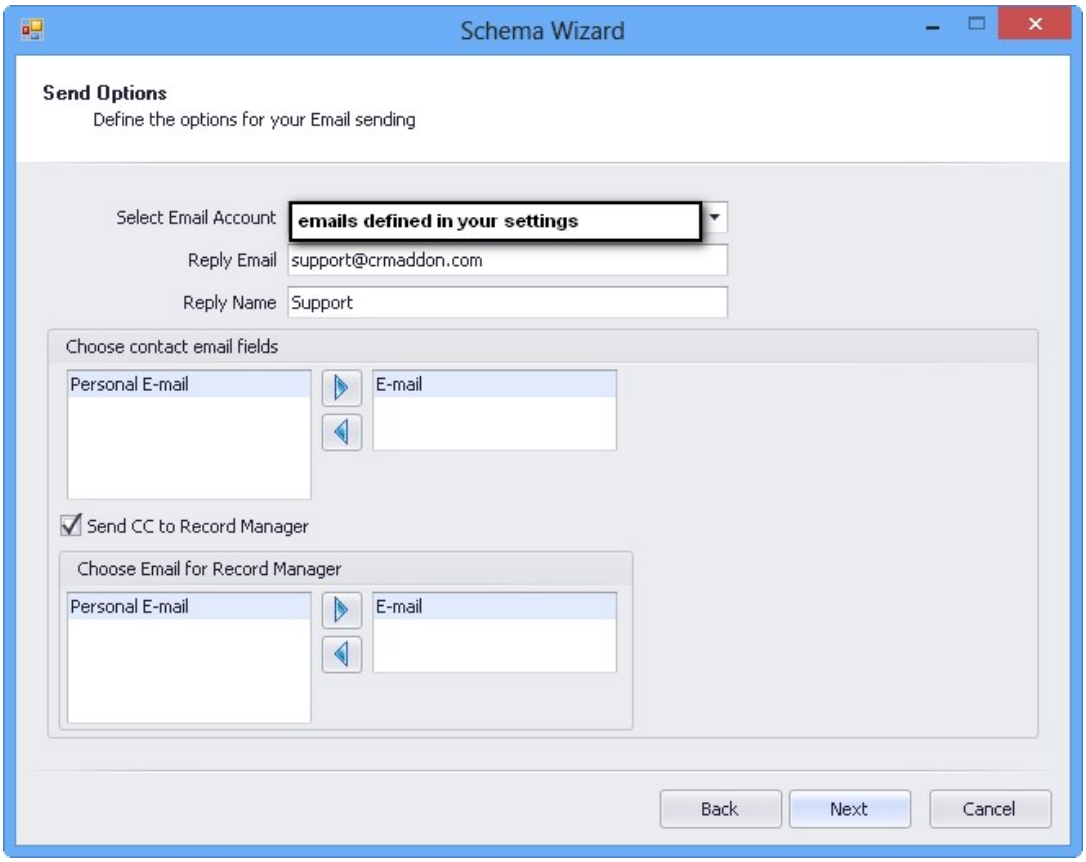
Here you can define a group of contacts you would like to send emails to:



'**Choose contacts**' - here you can define whether to send emails to all contacts or only to contacts containing in specific group or groups. In case you would like to send emails to the contacts within specific groups, you need to choose those groups from the drop-down list.
'**If is ticked then don't send an email**' - you can define which contacts not to send emails
'**Don't send emails to contacts which are in the group/s**' - A contact can be included to several groups. Use this option in case you need to send emails to specific groups but would like to exclude those contacts which belong to other groups, defined in this list.

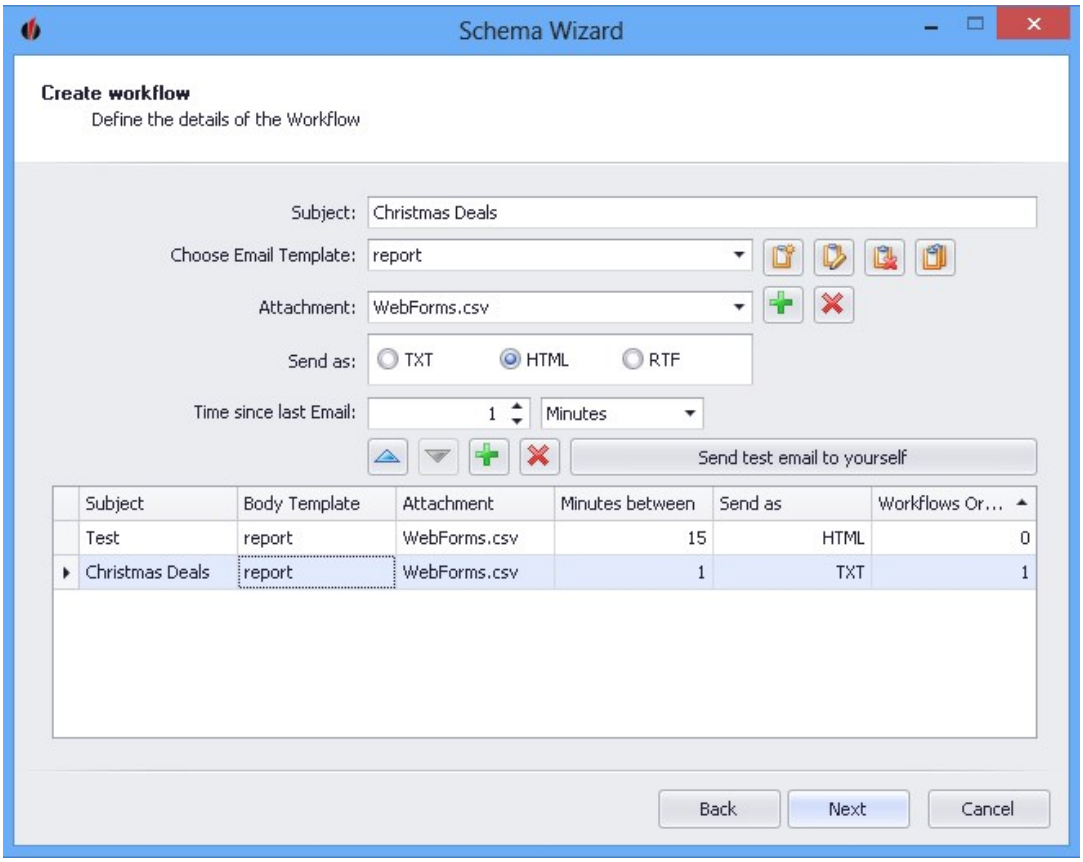
Then you can define the options for your emails sending.

'**Select Email Account**' - You will be offered to select an email account for emails sending which is defined in your settings
'**Reply Email**' - Add here the email which will be displayed in 'From' field and which you can get the replies to.
'**Reply Name**' - Specify here the reply name
'**Choose contact email fields**' - choose here the fields with emails you'd like to send to. In the left column all email type fields are displayed where your contacts have emails, in the right column are shown the fields with email addresses where the emails will be sent to. Please use arrows to transfer the needed fields.
'**Send CC to Record Manager**' - Check this box if you'd like the Record Manager to receive a copy
'**Choose Email for Record Manager**' - Choose which email will be used for sending a copy to the Record Manager

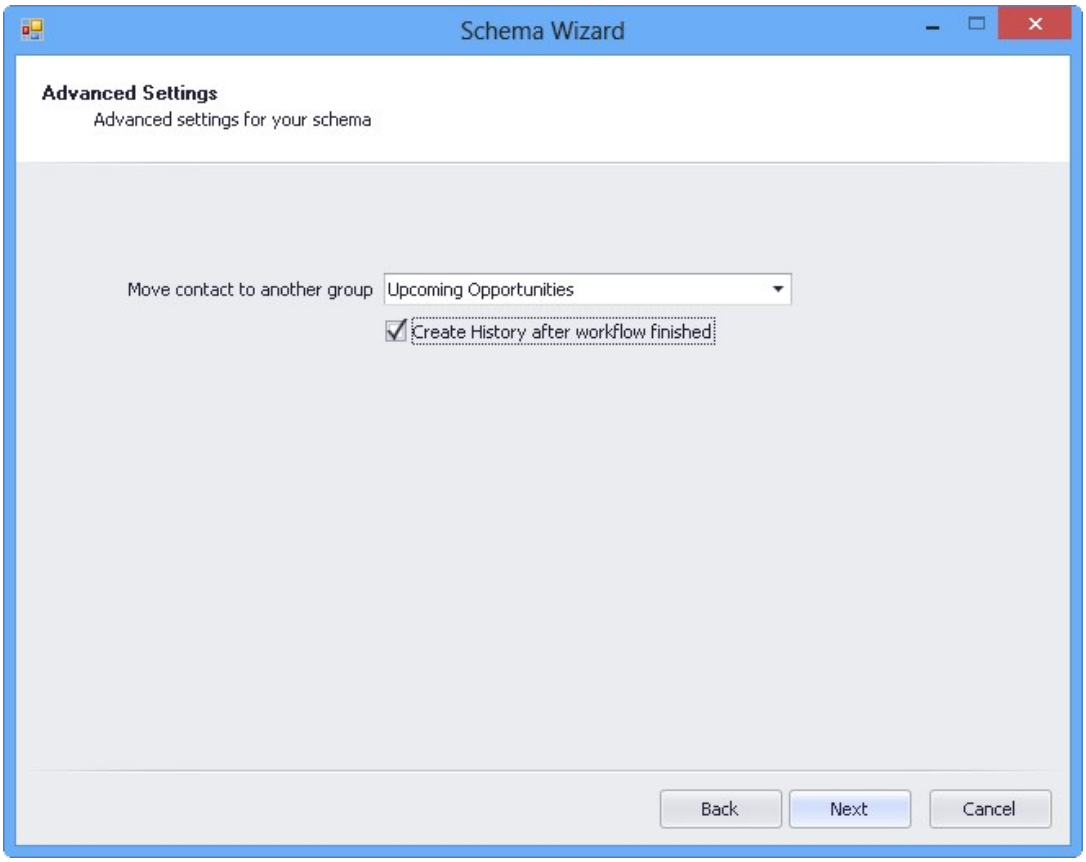


On the following window you will need to specify settings for your outgoing emails:

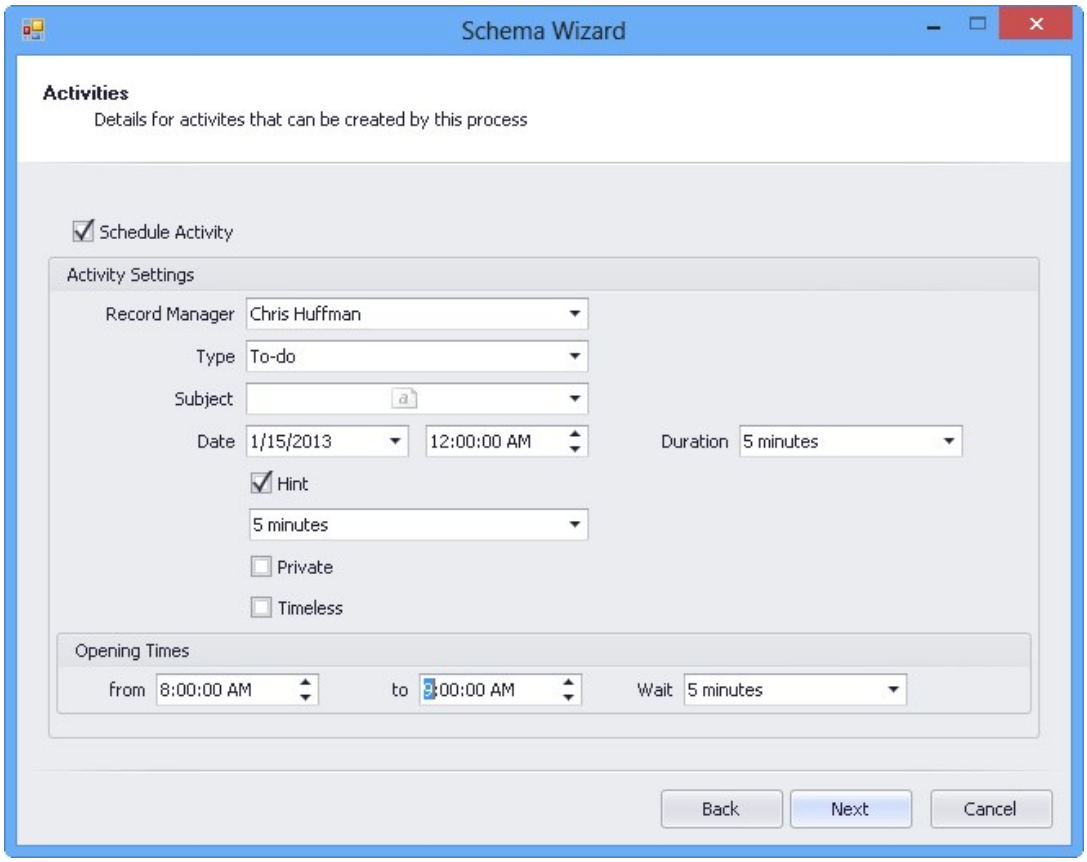
- **'Subject'** - Your outgoing email subject
- **'Choose Email Template'** - Select here a template for your outgoing email or create a new one with Report Designer tool.
- **'Attachment'** - Choose an attachment defined under attachments settings on the Options window
- **'Send as'** - Select a format the email will be sent in
- **'Time since last mail'** - Select the time since the last email
- '**Send test email to yourself**' - use this option to send a test email to yourself to see how it looks before sending mass mails.



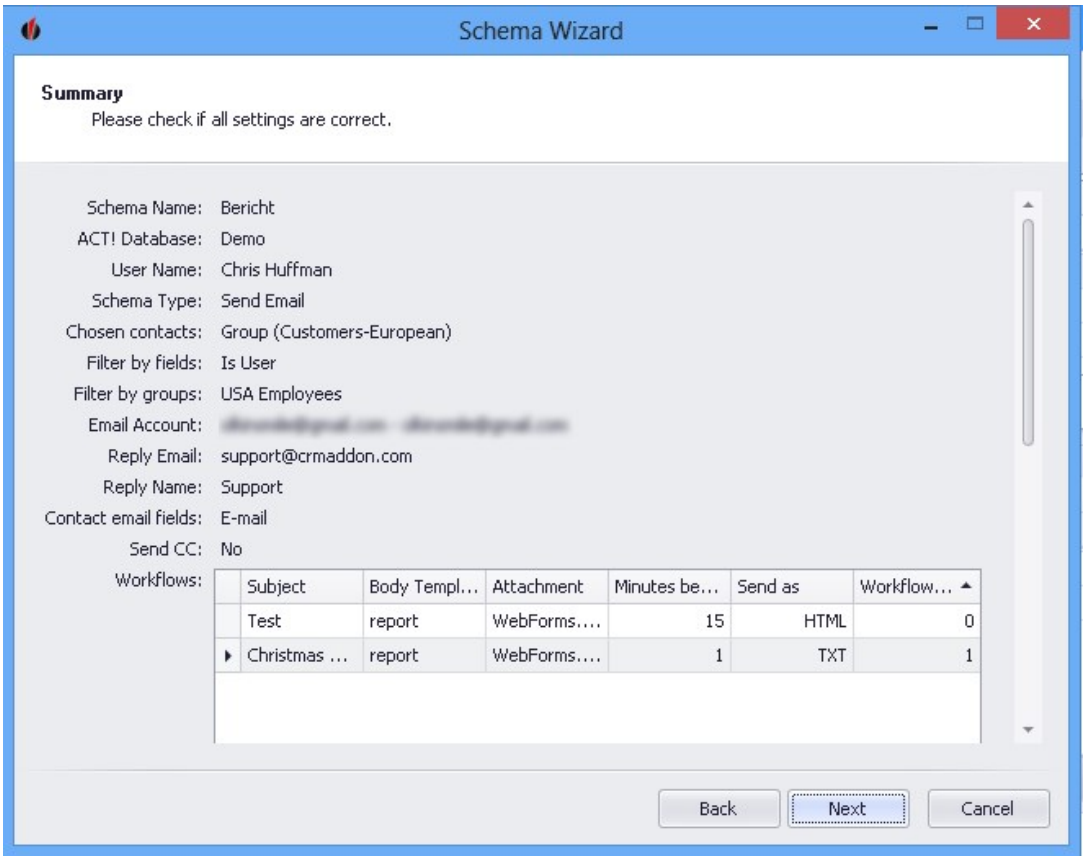
On the following dialog you can specify the group your contacts will be moved to after emails sending. It is also possible to create a History after sending emails by checking '**Create History after workflow finished**' .



Here you can set to create an Activity and specify Activity settings like Record manager, subject, date/time, duration and opening time frame for Activity planning:



By specifying all above settings you will configure the Send Email Schema.
At the final step of the wizard you will see a summary of defined settings:

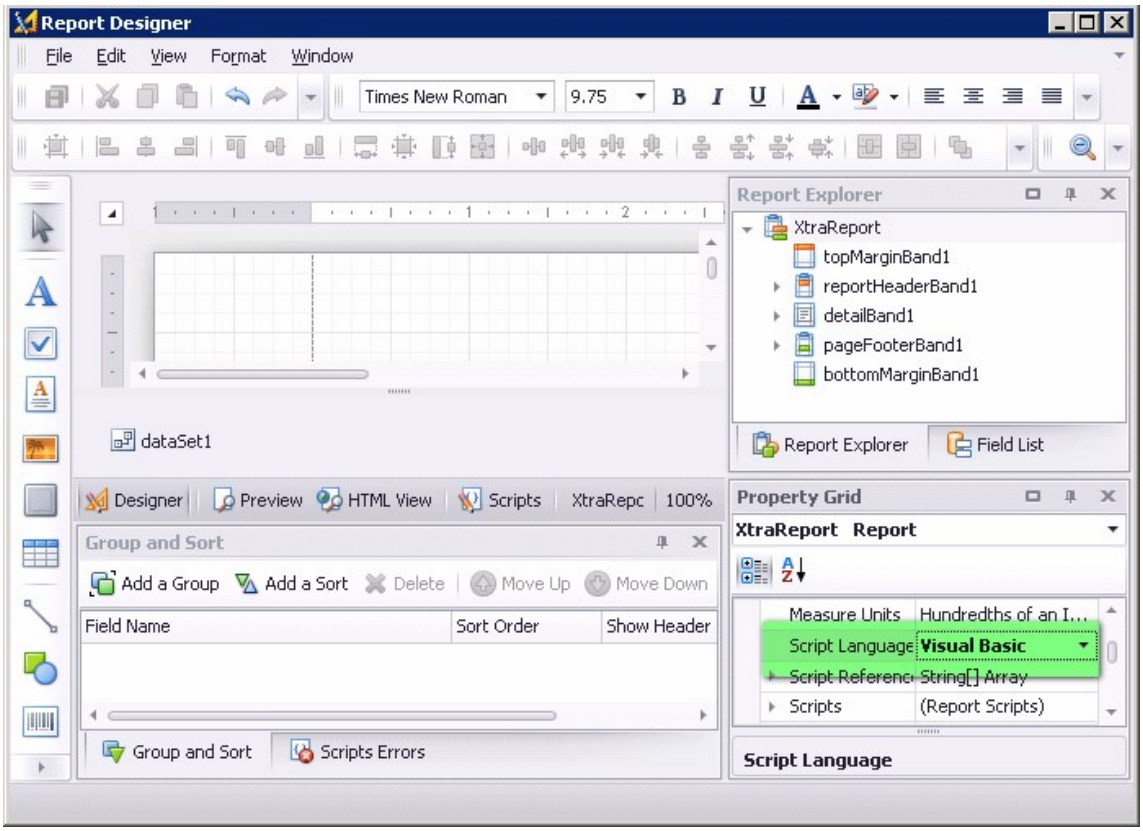

Schema Wizard
Summary
Please check if all settings are correct.
Schema Name: Bericht
ACT! Database: Demo
User Name: Chris Huffman
Schema Type: Send Email
Chosen contacts: Group (Customers-European)
Filter by fields: Is User
Filter by groups: USA Employees
Email Account:
Reply Email: support@crmaddon.com
Reply Name: Support
Contact email fields: E-mail
Send CC: No
Workflows:
Subject | Body Templ... | Attachment | Minutes be... | Send as | Workflow...
Test | report | WebForms.... | 15 | HTML | 0
Christmas ... | report | WebForms.... | 1 | TXT | 1
Back
Next
Cancel

See also

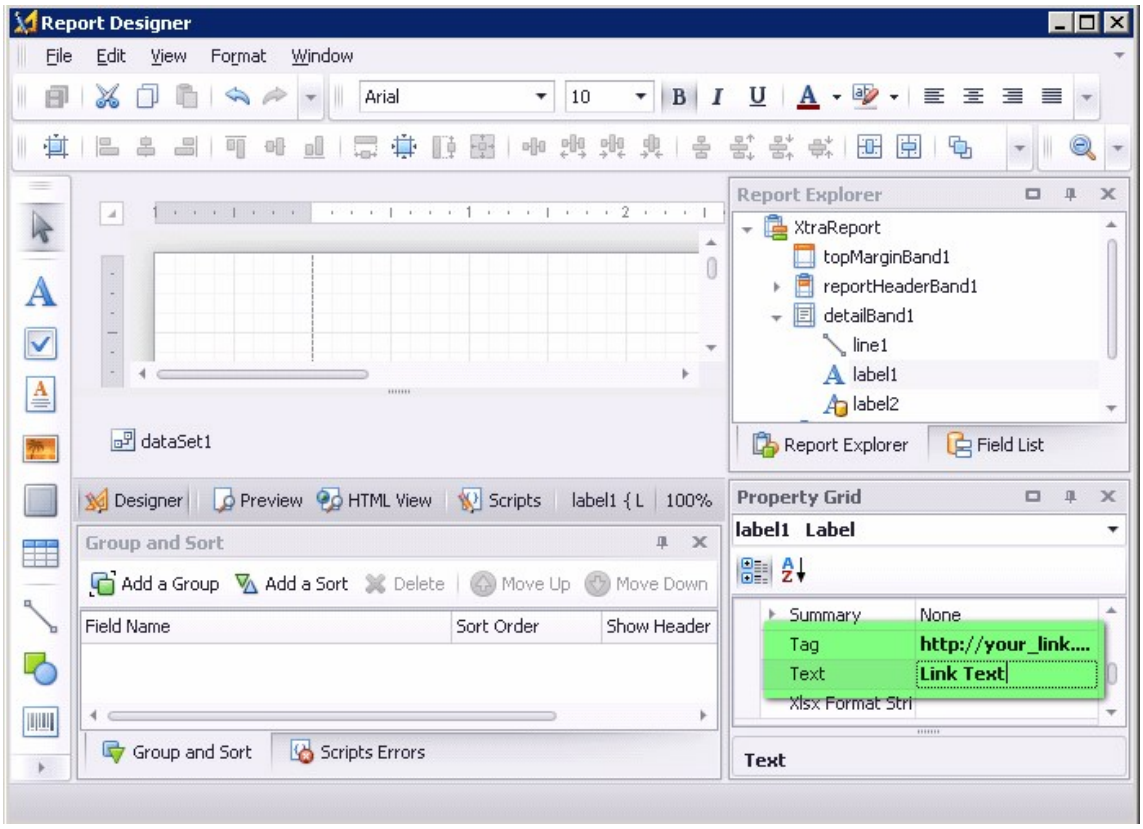
Schema Print Report Wizard
Schema Notify by Email
Send Fax Schema
Bounced Emails Schema
Jobs Schema

How to add a clickable link in HTML report

It is very important to add clickable links with HTML reports. The following tutorial will show how to insert a clickable text link to a report.
First of all, please launch your **report designer** and choose the report template where you would like to add a clickable link. After you have done this choose the script language for your script, for this purpose **Visual Basic** should be selected in the **Property Grid**:

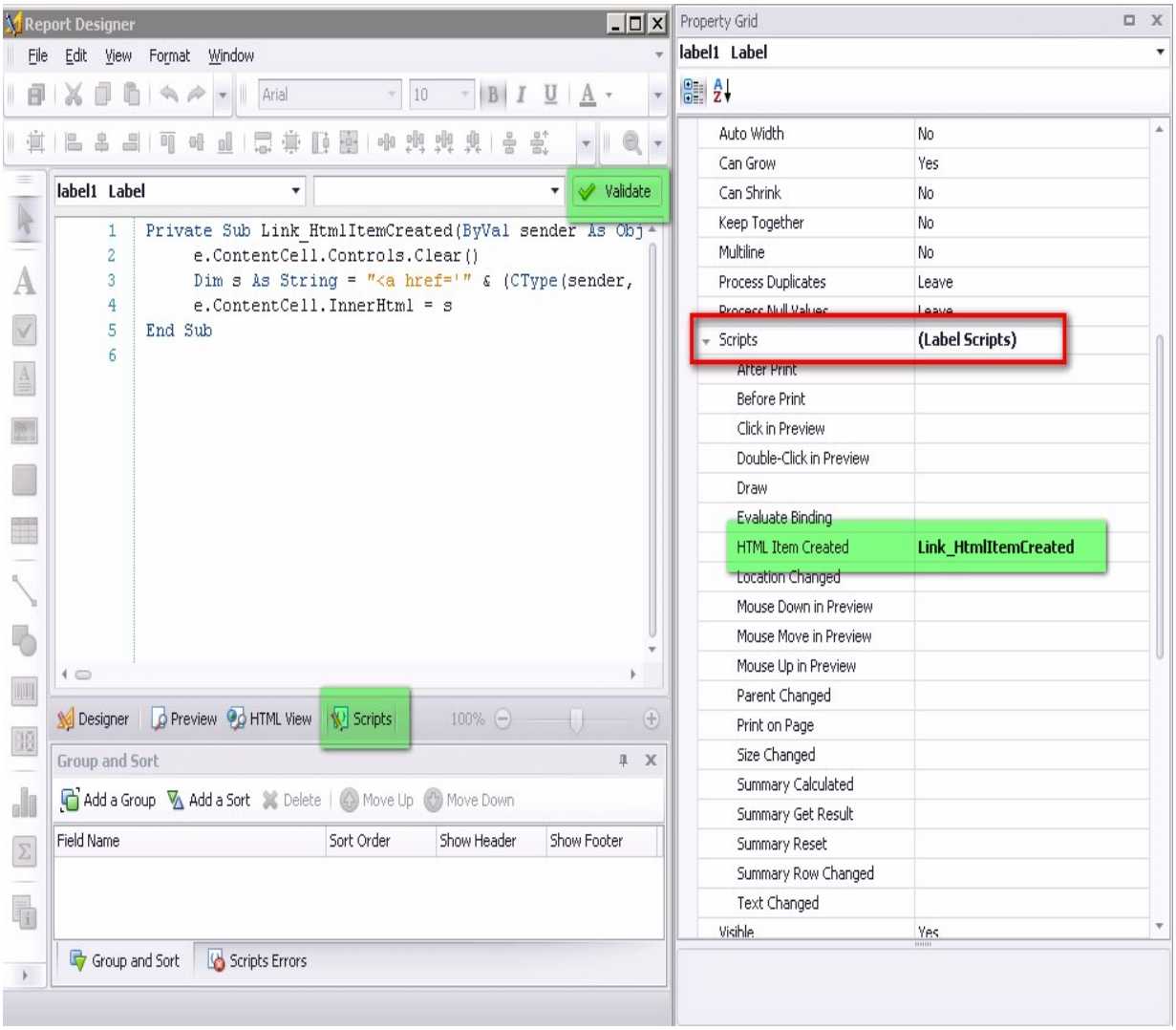


On this step we will add a link and a text assigned to it as long as special script which will help to open the link in the HTML report. For this purpose, please choose the label you would like to add a link to and define the link in '**Tag**' field and text in '**Text**' field:



Then we need to open Label Scripts, choose '**HTML Item Created**' and insert the following script for it:

```
Private Sub Link_HtmlItemCreated(ByVal sender As Object, ByVal e As
DevExpress.XtraReports.UI.HtmlEventArgs)
     e.ContentCell.Controls.Clear()
     Dim s As String = "<a href='" & (CType(sender, XRControl)).Tag.ToString() & "'>" &
(CType(sender, XRControl)).Text & "</a>"
     e.ContentCell.InnerHtml = s
End Sub
```



For validating the script we can use '**Validate**' option (highlighted with green on the above image).
That's it!

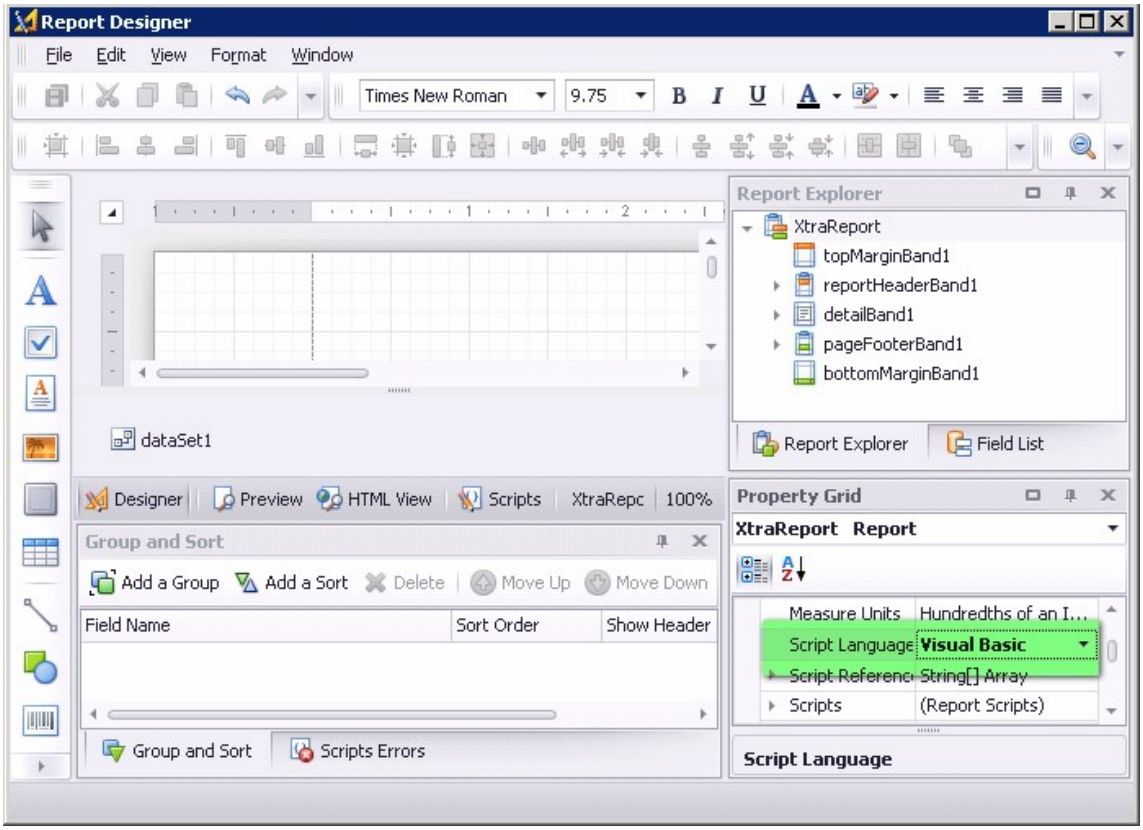
See also

How to add a clickable image in HTML report

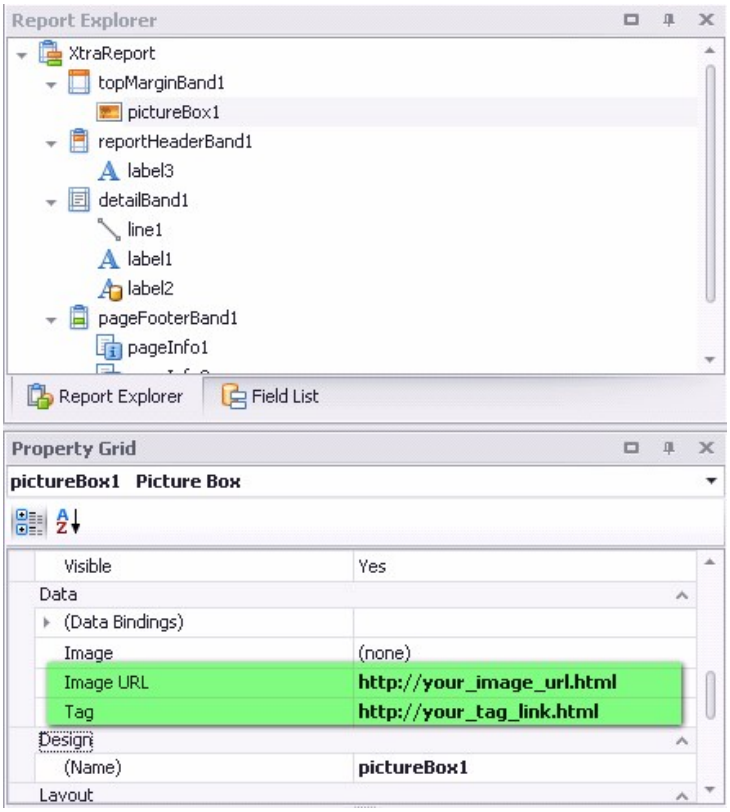
How to add a clickable image in HTML report

For adding a clickable image the process is the same as with a text link with the only difference that previously we have edited the label and now we will work with a **Picture Box**.
To add a clickable image first of all you'd need to launch your **report designer** and choose the report template where you would like to add a clickable image. After you have done this

choose the script language for your script, for this purpose **Visual Basic** should be selected in the **Property Grid**:

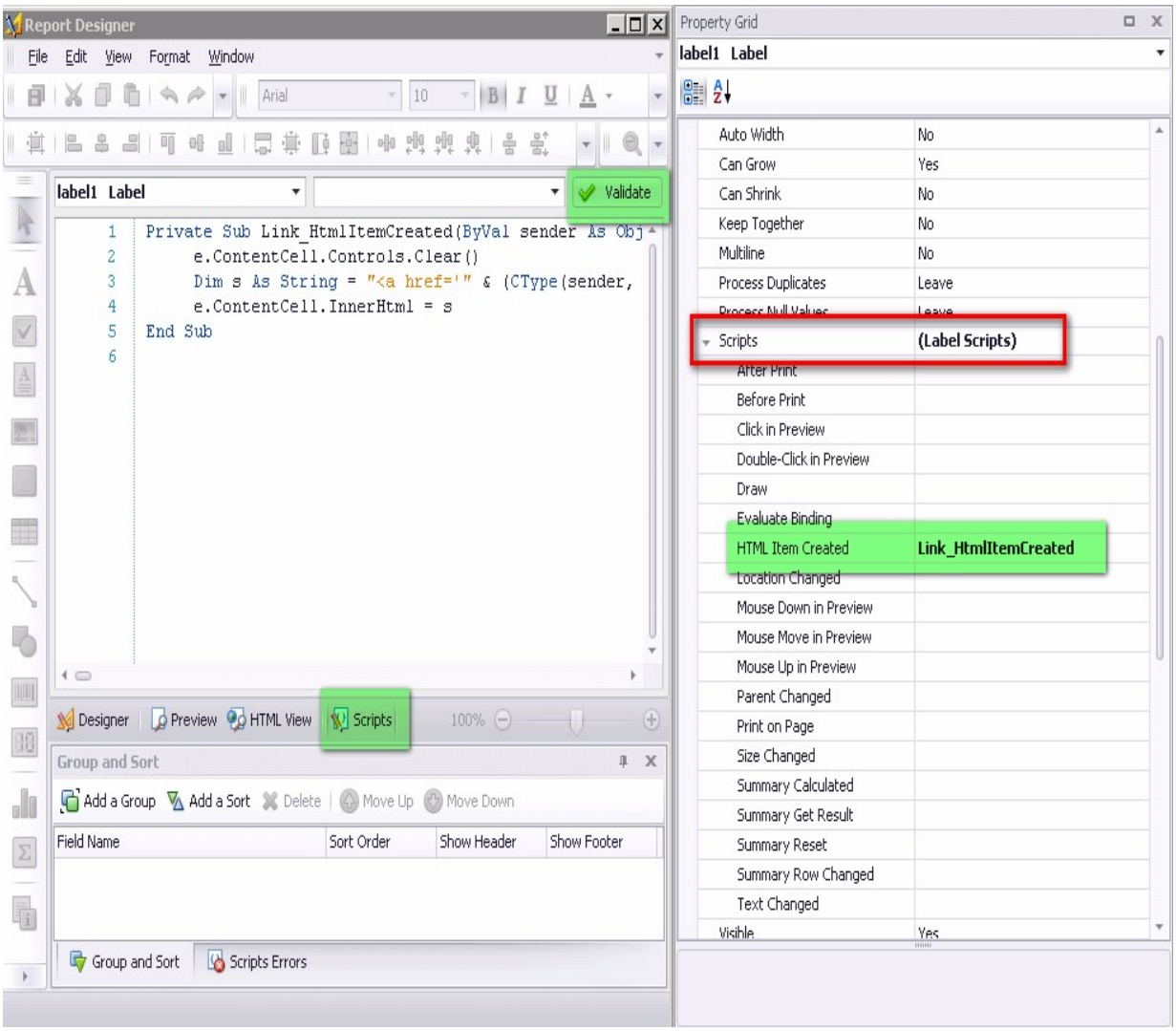


After you have positioned your image in your report template please define in the Picture box a link to your image in '**Image URL**' field. Then a link which will be triggered upon clicking on the image should be defined in '**Tag**' field**:**



Then under Scripts open 'HTML Item Created' and insert the following script:

```
Private Sub Header_HtmlItemCreated(ByVal sender As Object, ByVal e As DevExpress.XtraReports.UI.HtmlEventArgs)
    e.ContentCell.Controls.Clear()
    Dim s As String = "<a href='" & (CType(sender, XRControl)).Tag.ToString() & "'>" & "<img src='" &
(CType(sender, XRPictureBox)).ImageUrl.ToString() & "' width=794' height='120' border='0'>" & "</a>"
    e.ContentCell.InnerHtml = s
End Sub
```



In the Picture Box settings you can define not only links but also picture size, border etc.

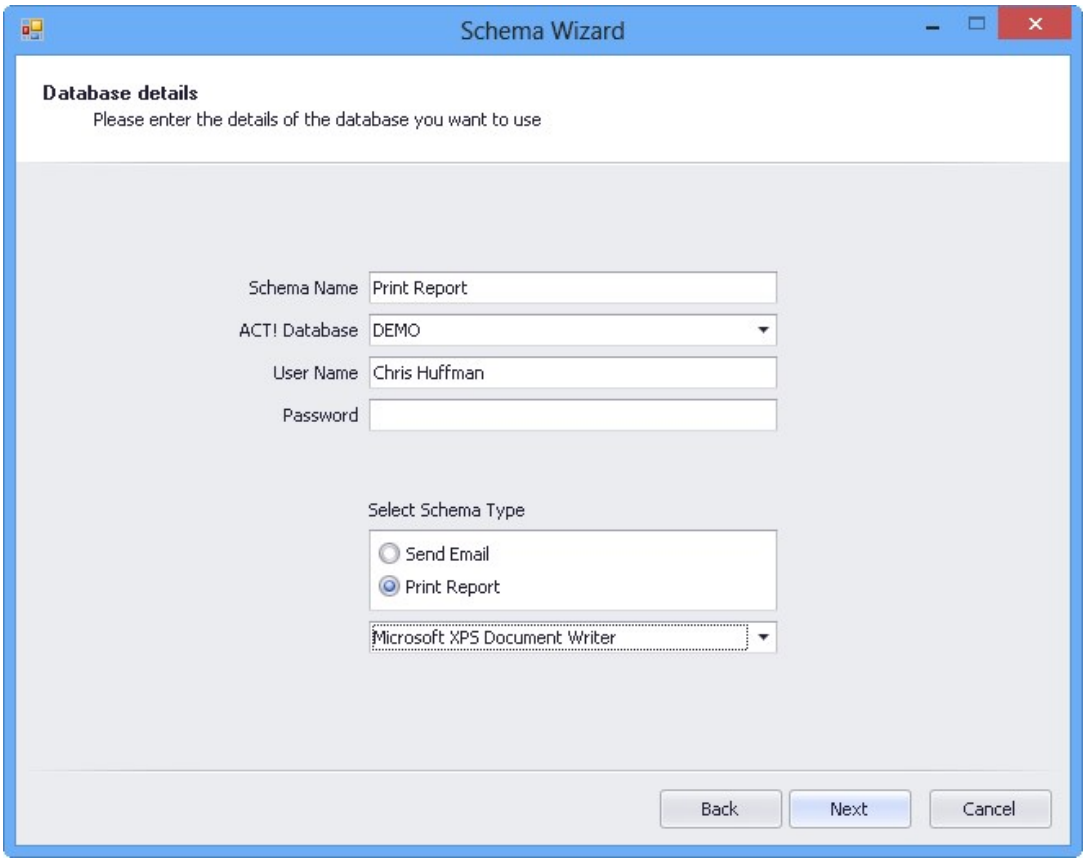
See also

How to add a clickable link in HTML report

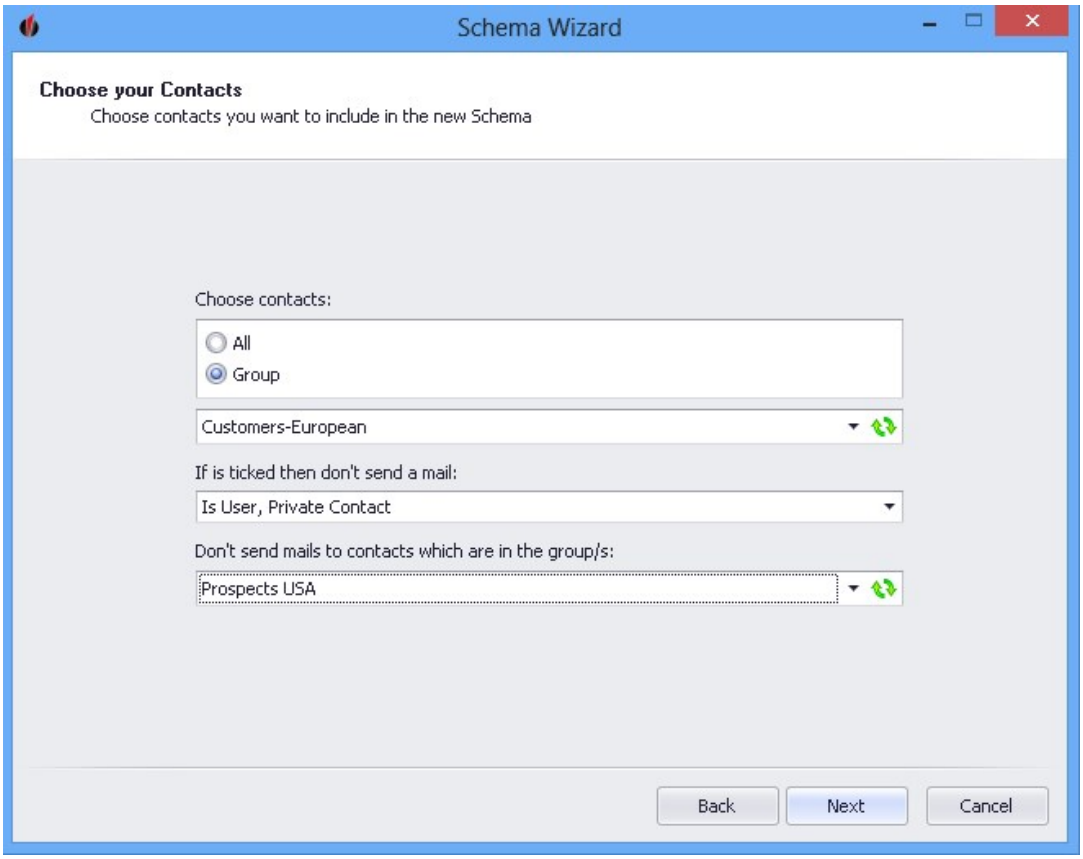
Schema Print Report Wizard

This example is for '**print Report**' schema type.

Specify on the following Window a path to your Act! database and your database details and printer and click "Next" button to log into the database you would like to work with and to proceed further:

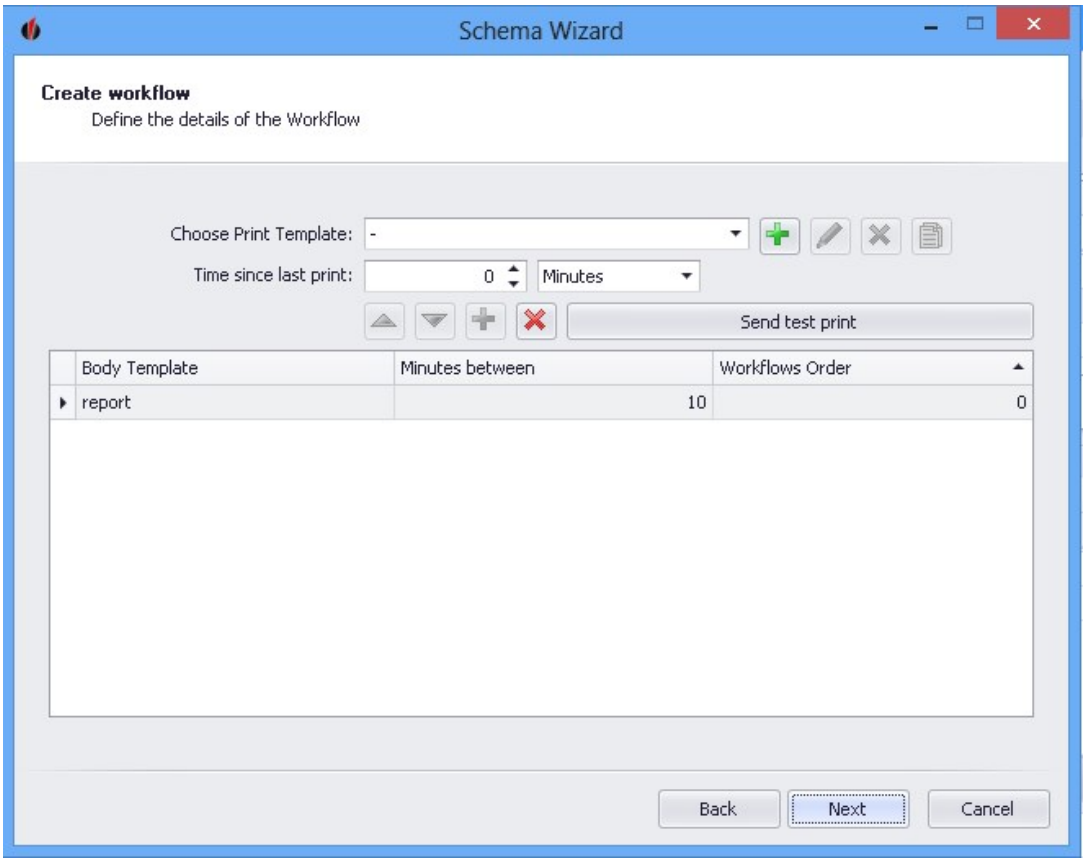


Here you can define a group of contacts you would like to print letters for:

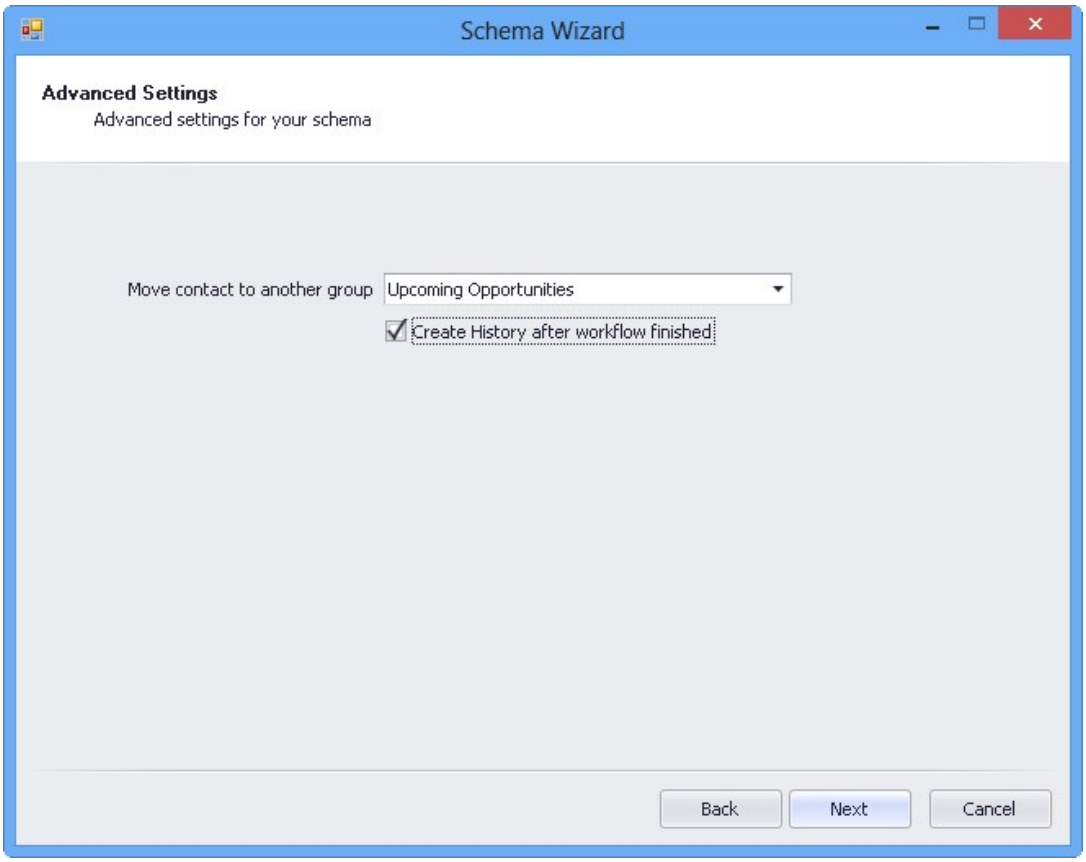


'**Choose contacts**' - here you can define whether to print letters for all contacts or only for contacts containing in specific group or groups. In case you would like to print letters for the contacts within specific groups, you need to choose those groups from the drop-down list.
'**If is ticked then don't send an email**' - you can define which contacts not to print emails for
'**Don't send emails to contacts which are in the group/s**' - A contact can be included to several groups. Use this option in case you need to print letters for specific groups but would like to exclude those contacts which belong to other groups, defined in this list.

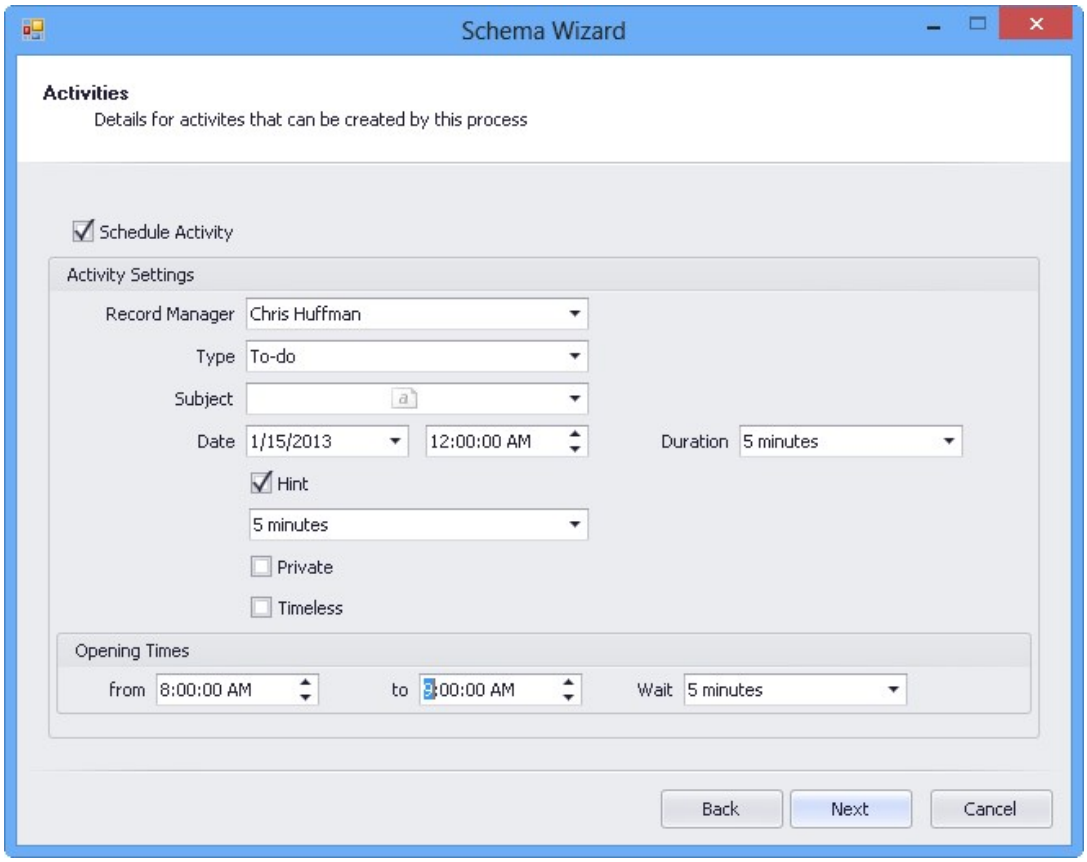
On the following window you will need to specify settings for letters printing:
'Choose Print Template' - here you can choose template for the letter which should be printer
'Time since last print' - define the time interval between prints
'Send test print' - initiate a test print job to see how your letter looks



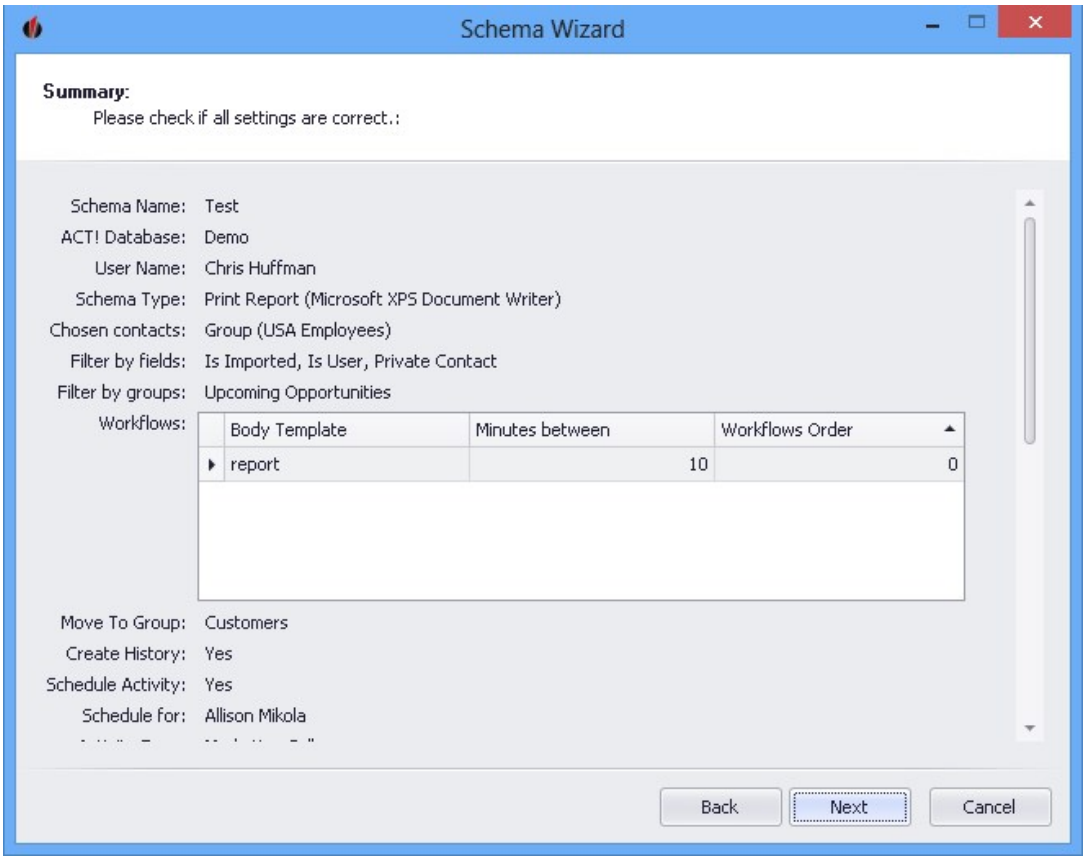
On the following dialog you can specify the group your contacts will be moved to after letters printing. It is also possible to create a History after printing a letter by checking '**Create History after workflow finished**' option.



Here you can set to create an Activity and specify Activity settings like Record manager, subject, date/time, duration and opening time frame for Activity planning:



By specifying all above settings you will configure the Print Report Schema. After completing all steps you will see the summary of all configured settings:

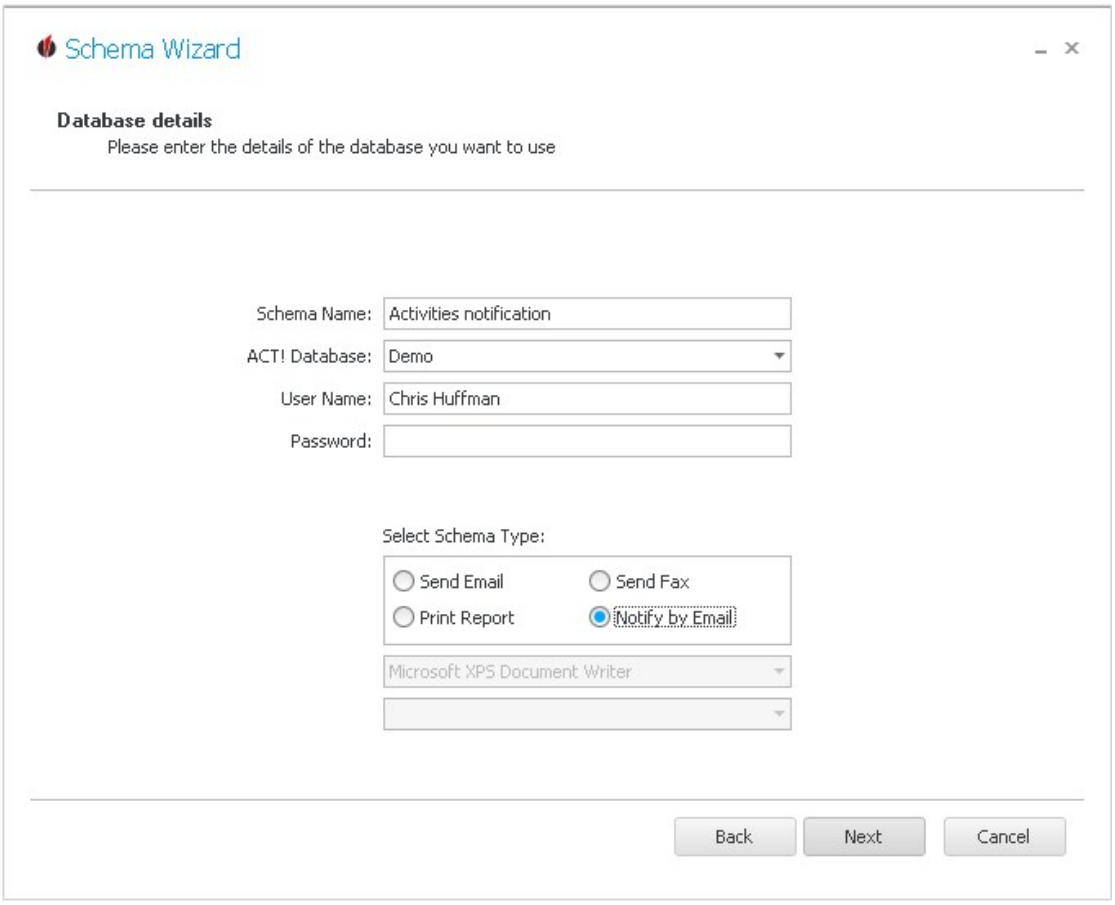


See also
Schema Send Email Wizard
Schema Notify by Email
Send Fax Schema
Bounced Emails Schema
Jobs Schema

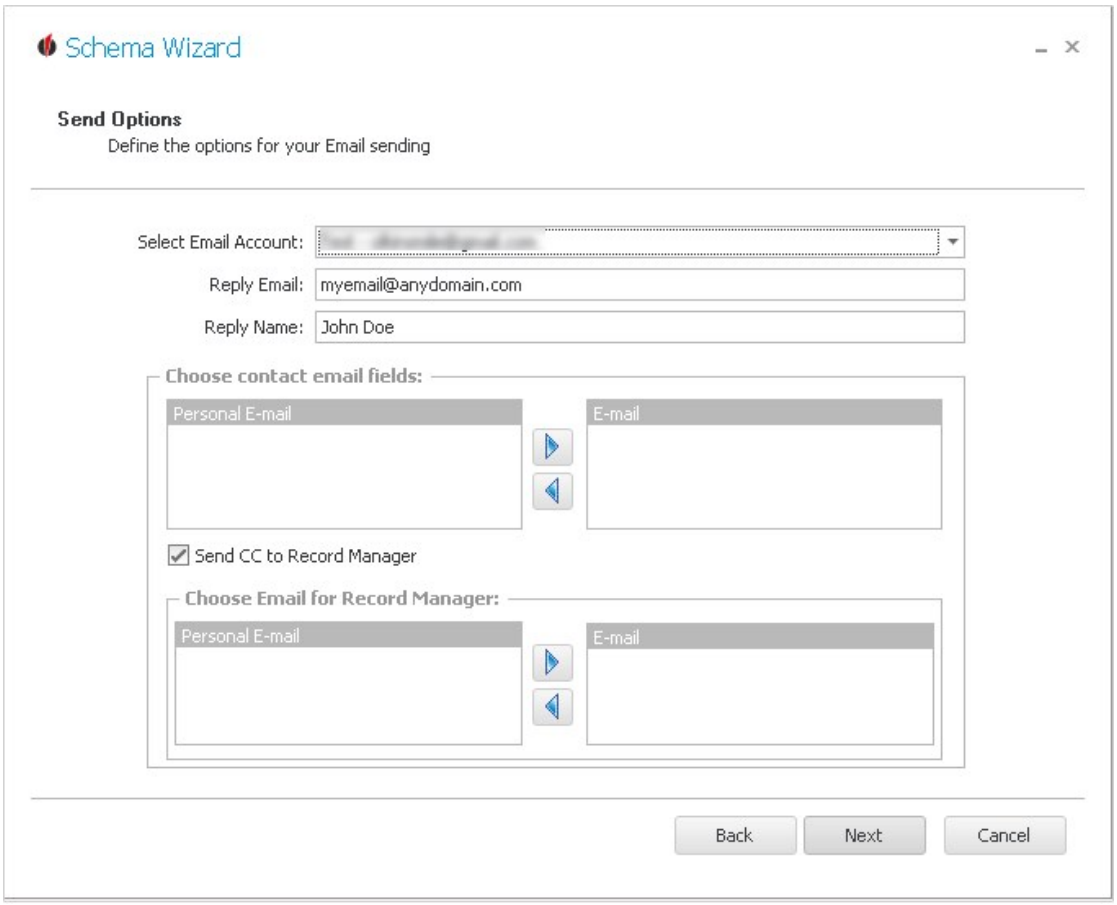
Home > How to create Outreach Schemas > Schema Notify by Email

Schema Notify by Email

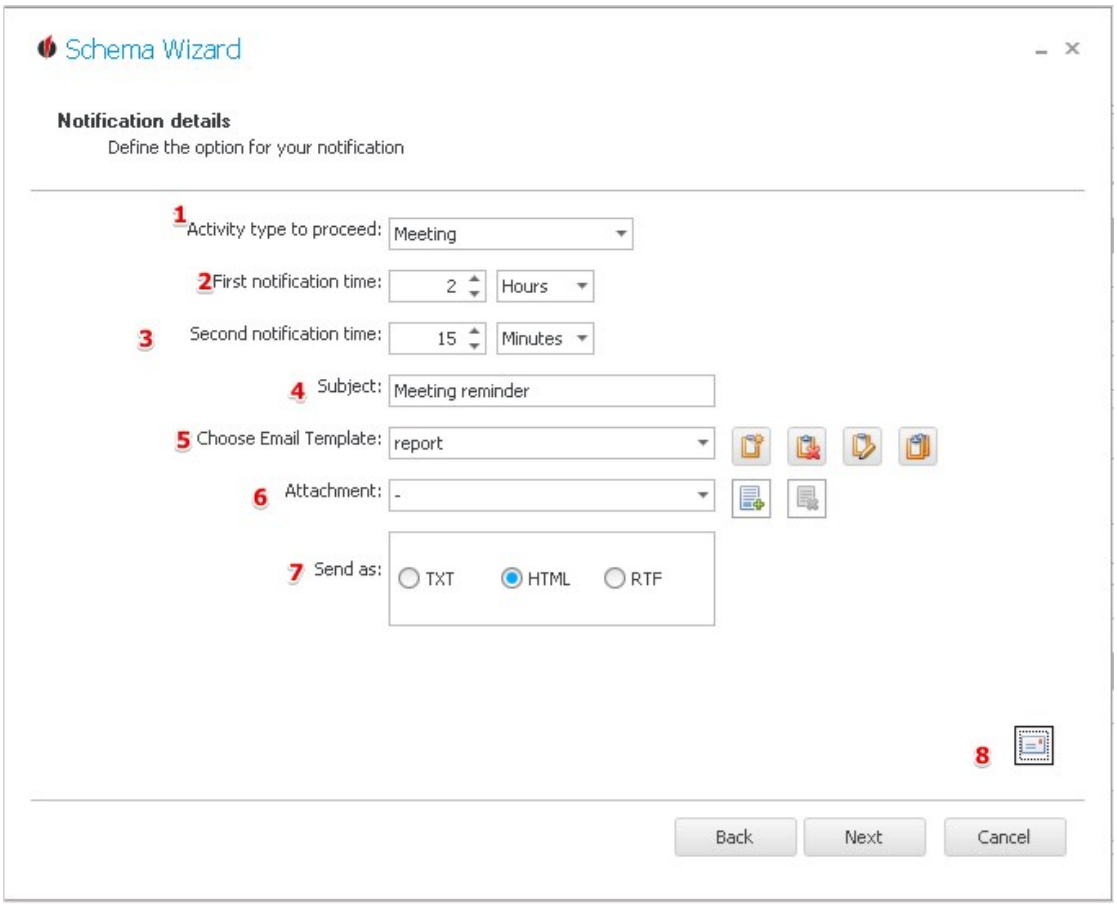
This feature allows users to configure email notifications on specific activities. This way OUTREACH|IT will send scheduled email notifications and remind about Act! activities. To configure this type of notifications, click button to create a schema and then choose '**Notify by email**' schema type:



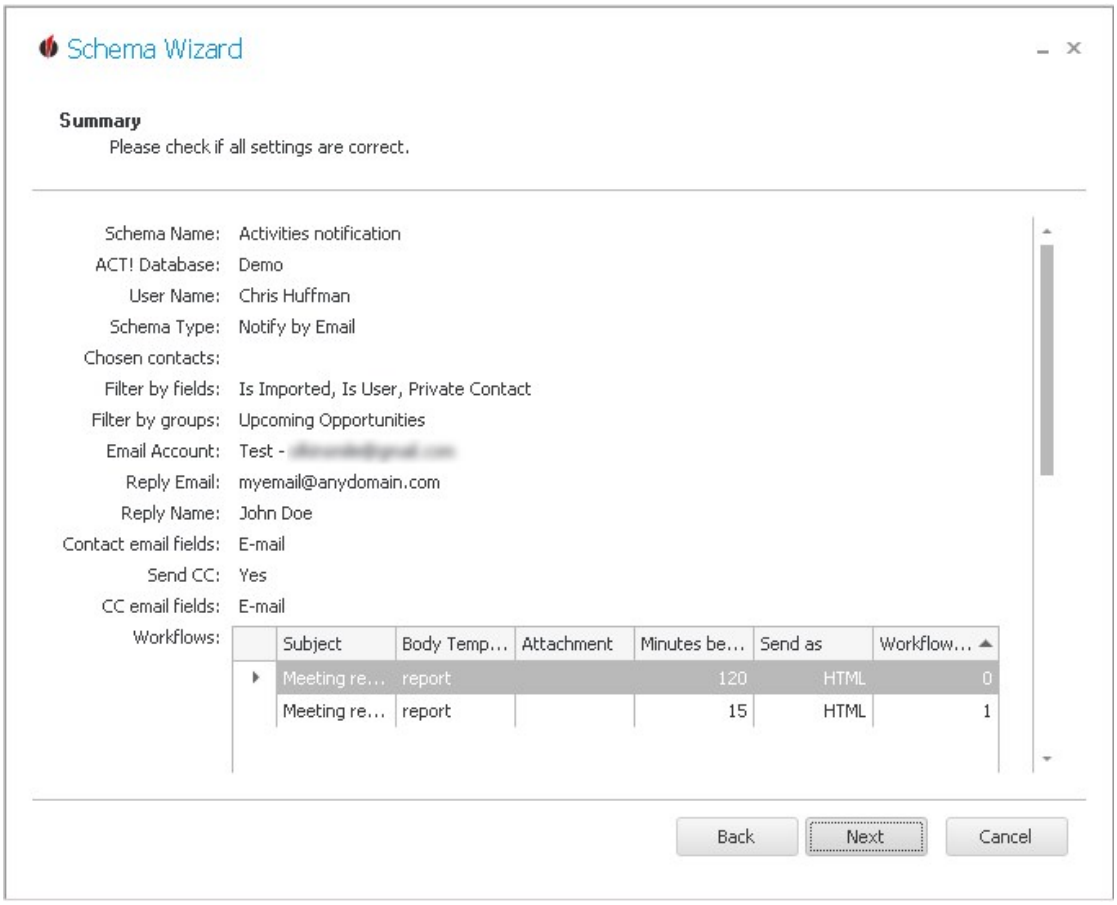
After this you'd need to configure email sending options:
'**Select Email Account**' - in case you have configured email accounts for emails sending in your OUTREACH|IT options, you will be able to choose an email here from the list.
'**Reply Email**' - Email where the user who received a notification can send a reply
'**Reply Name**' -The name of the person who has sent a notification
'**Choose contact email field**' - you can choose here the Act! field which contains an email where a notification should be sent
'**Choose email for Record Manager**' - here you can define Act! field which contains your Record Manager's email



Here you can define options for your notifications:
1. '**Activity type to proceed**' - Check here the type of the activity which the notification will be sent for
2. '**First notification time**' - the time for the first notification. The time before the activity is due can be defined here
3. '**Second notification time**' - the time for the second notification. The time before the activity is due can be defined here
4. '**Subject**' - Your notification subject
5. '**Choose Email Template**' - Your notification template. It can be created with help of the report designer and uploaded to your templates list .
6. '**Attachment**' - choose here an attachment if it should be also sent
7. '**Send as**' - define here the format for your email
8. Click this button to send a test notification



After you have configured all settings, click '**Next**' button to proceed further. You will see a summary for your schema:

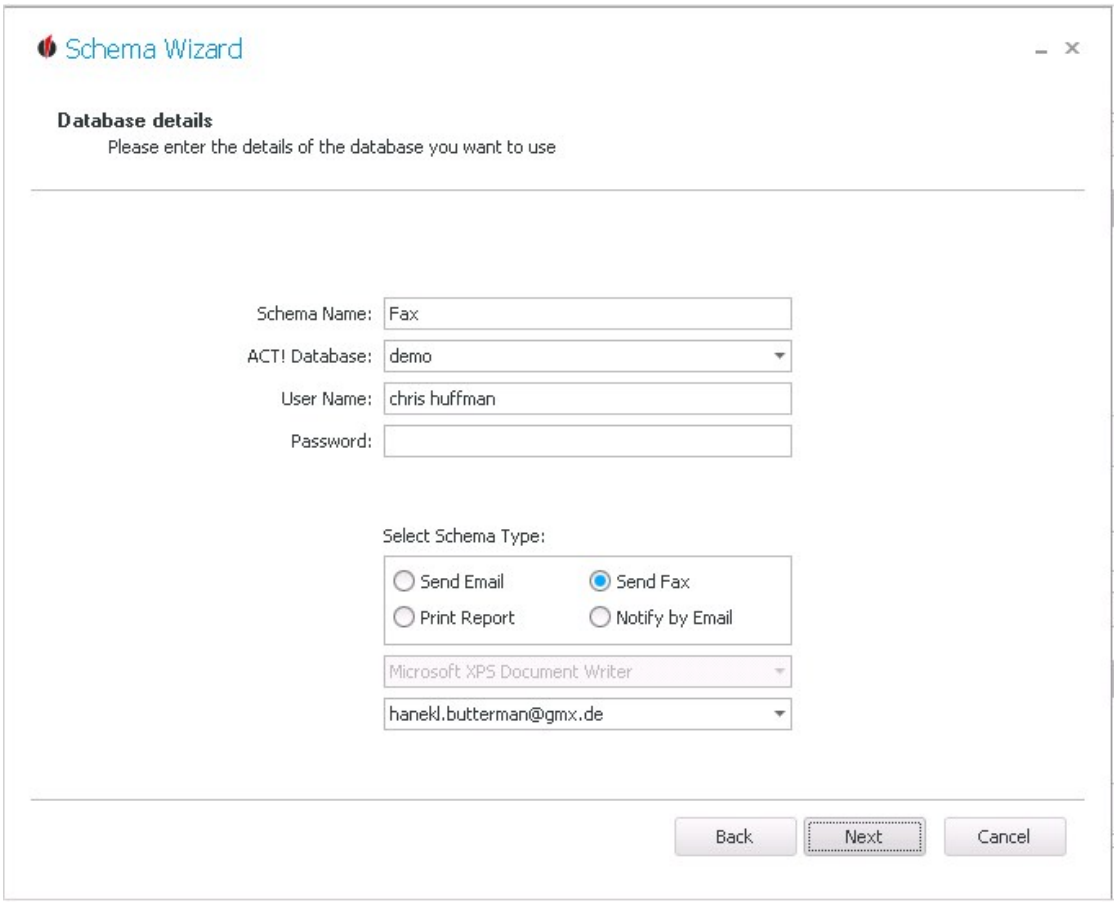


See also

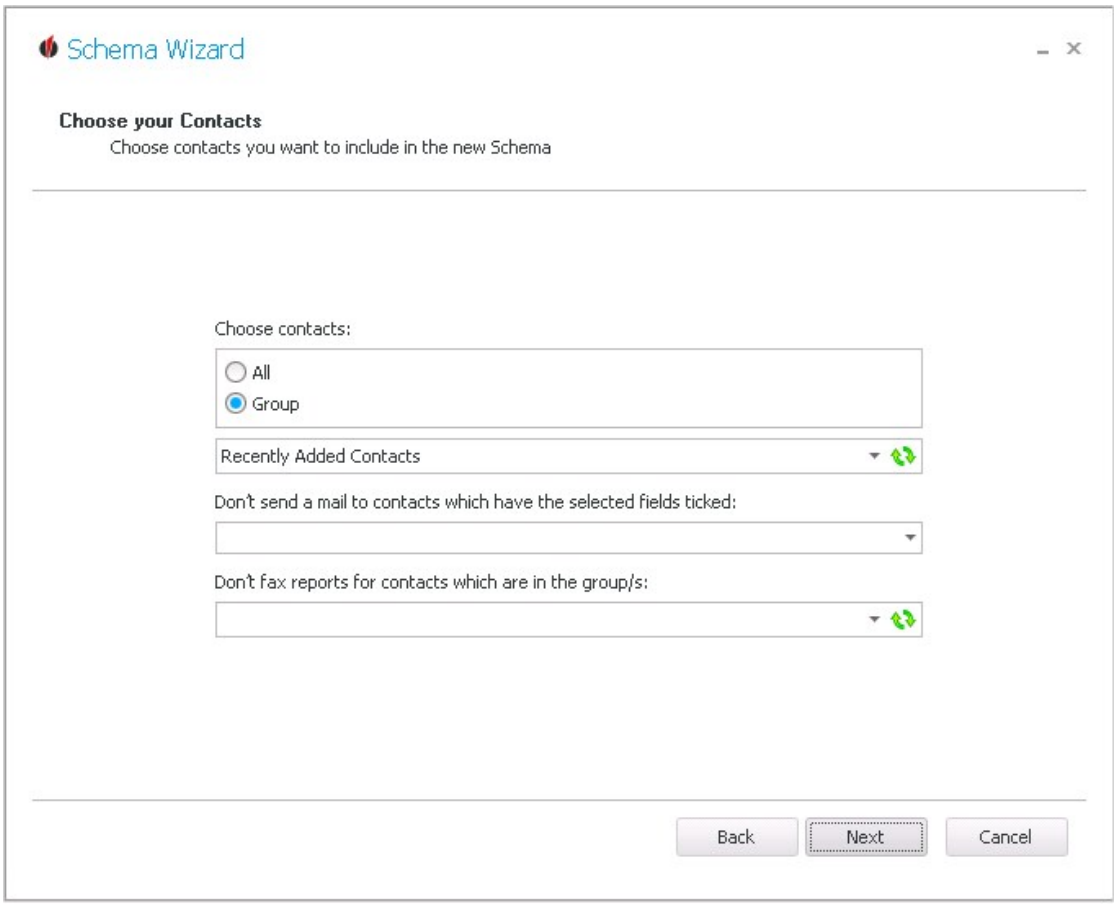
Schema Send Email Wizard
Schema Print Report Wizard
Send Fax Schema
Bounced Emails Schema
Jobs Schema

Send Fax Schema

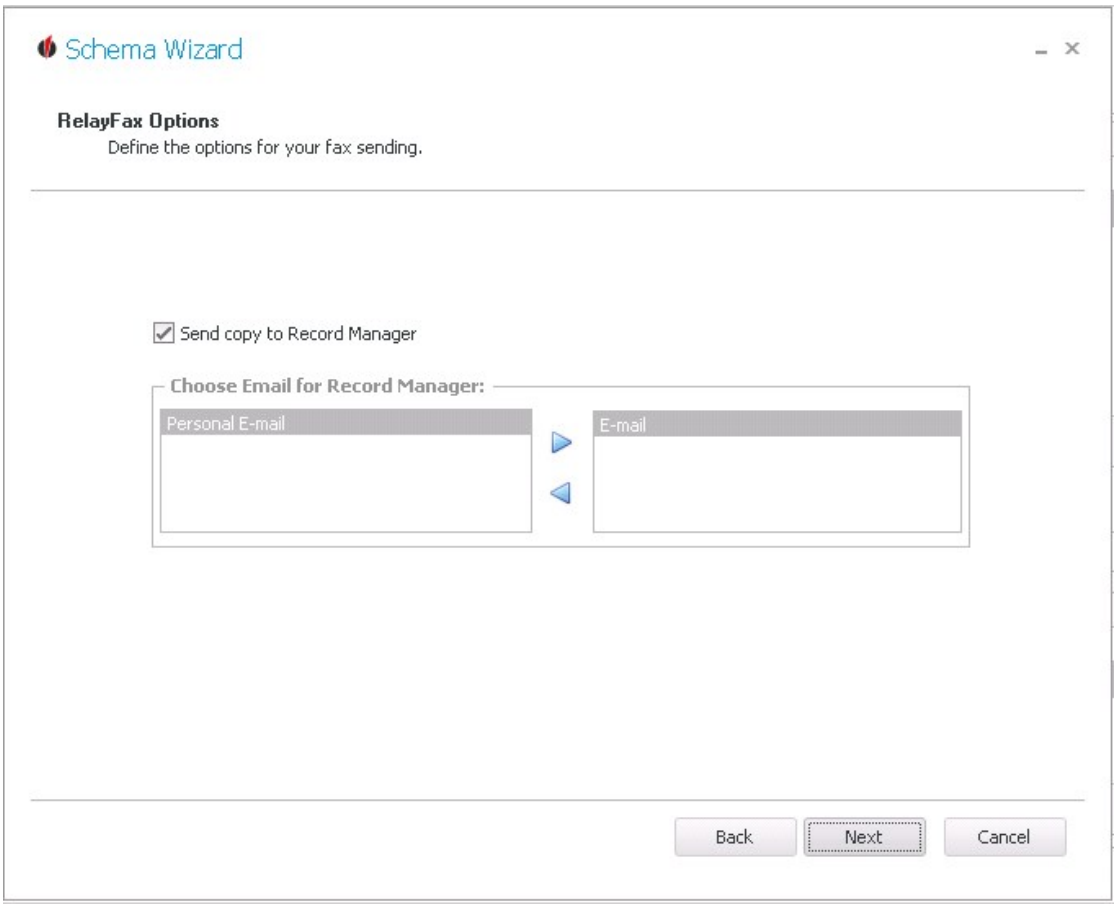
'Send Fax' Outreach Schema allows sending faxes automatically via RelayFax software. First of all you need to specify your Act! database connection and choose '**Send Fax**' as your schema type.



Now you need to define the groups for fax sending. You can also apply the following filters here:
'**Group filter**' - here you can define your Act! groups which should receive your faxes
'**Don't send a mail to contacts who have the selected fields ticked**' - here you can exclude contacts who have specific fields ticked
'**Don't fax reports for contacts who are in the group/s**' - here you can exclude contacts who belong to specific groups

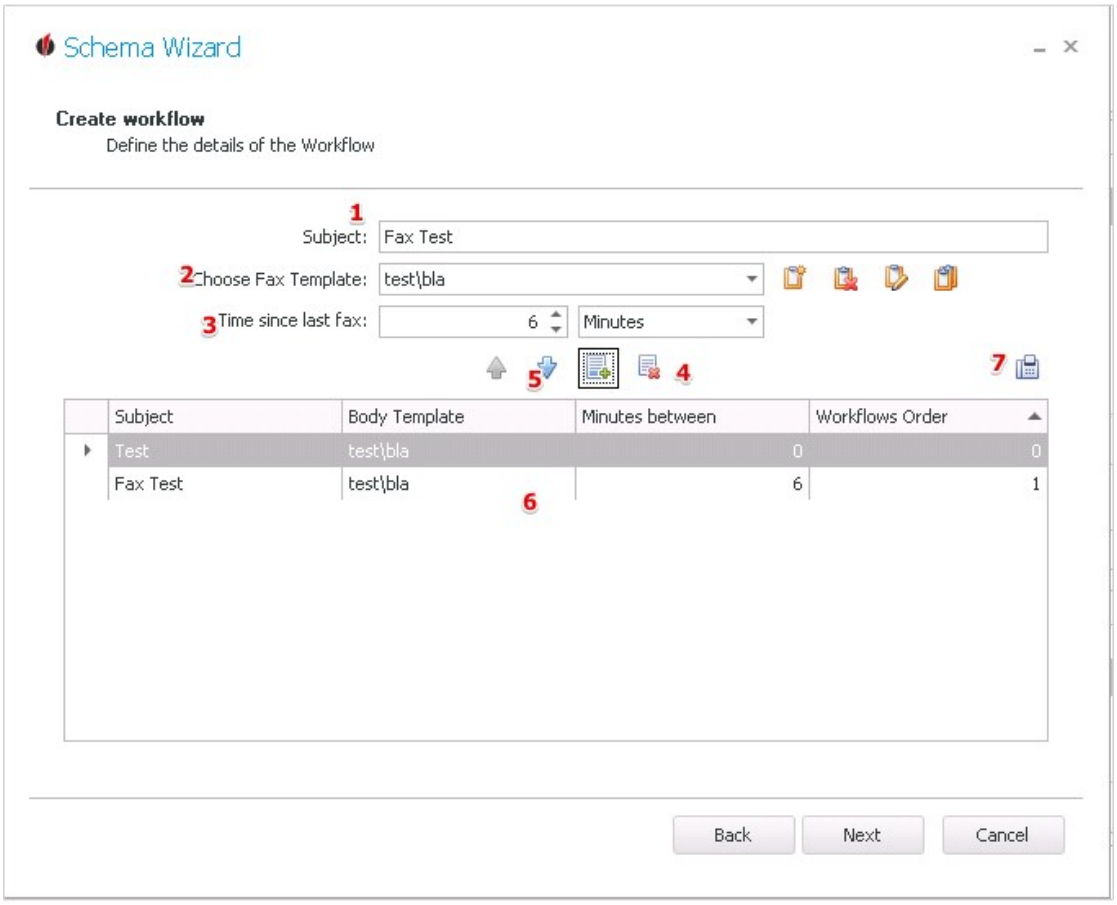


Here you can **enable / disable** an option which allows sending a copy of your mail to the record manager

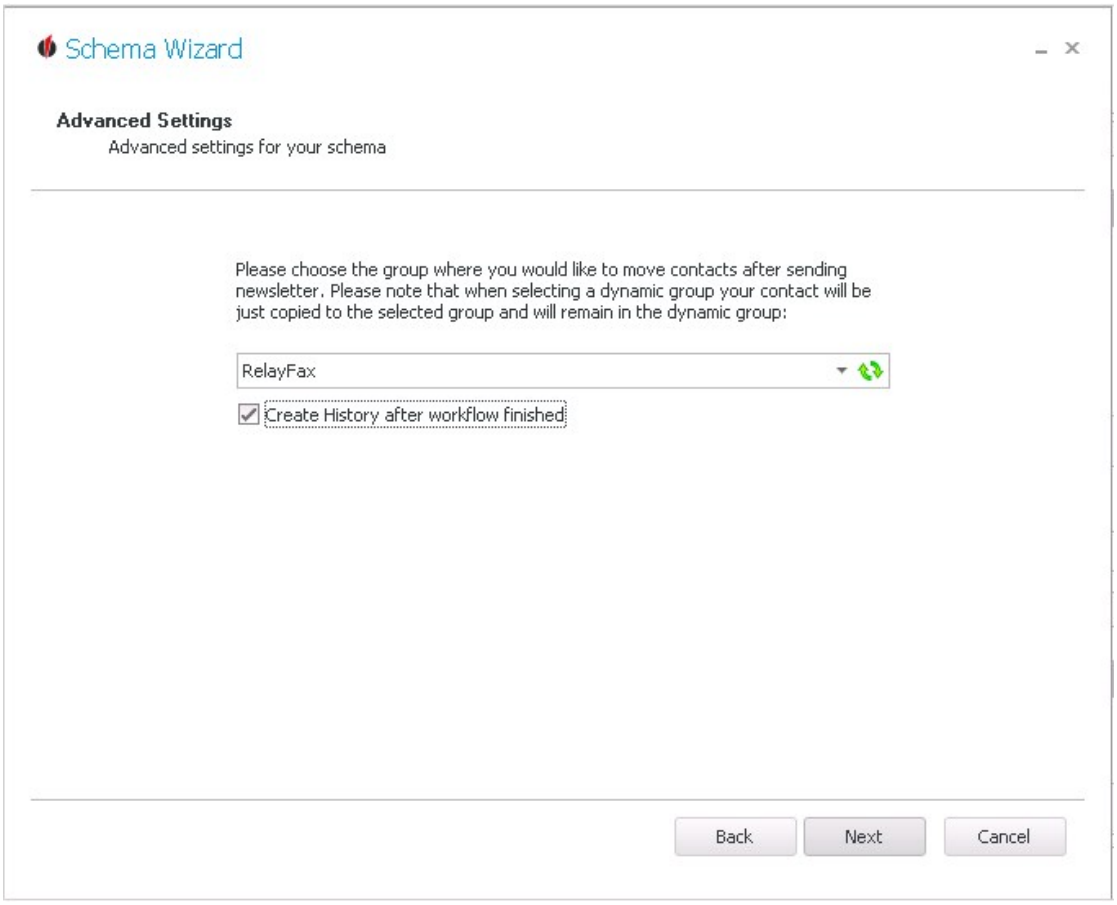


Here you will need to create your schema workflow:

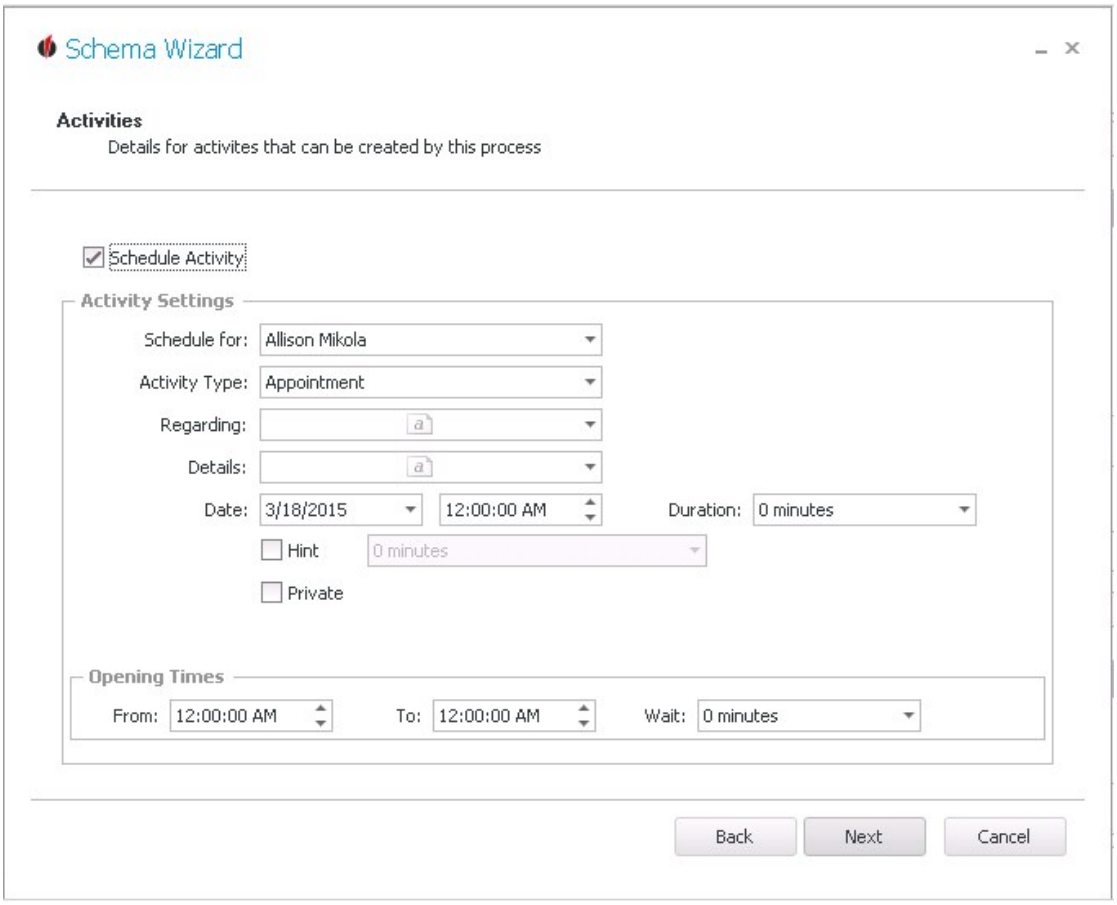
1. '**Subject**' - define your fax email subject
2. '**Choose fax template**' - here your fax template created with help of report designer should be chosen.
3. '**Time since last fax**' - define here your fax sending time settings
4. '**Adding or removing workflow record**' - if you would like to add a defined workflow, click button. In case you would like to remove a selected workflow then click button.
5. '**Reordering workflows**' - use arrows to reorder your workflow records
6. '**Workflows list**' - this is the list of the created workflows
7. '**Send a test fax**' - click this button to send a test fax message



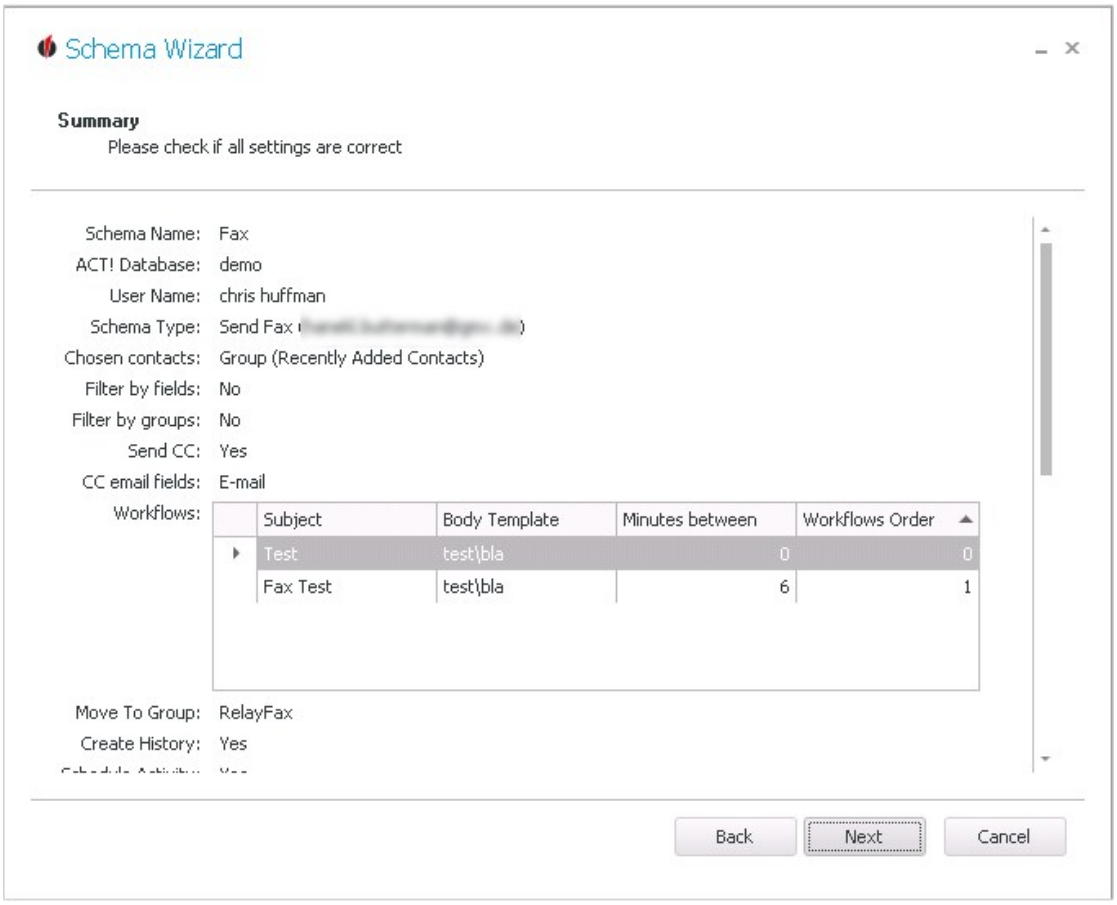
You can create a history after your workflow has finished or move contacts to specific group


Schema Wizard
Advanced Settings
Advanced settings for your schema
Please choose the group where you would like to move contacts after sending newsletter. Please note that when selecting a dynamic group your contact will be just copied to the selected group and will remain in the dynamic group:
RelayFax
Create History after workflow finished
Back
Next
Cancel

Optionally you can set the application to schedule activities and define settings for this.



After you have configured everything, you will be able to check configuration in the schema summary. In case anything should be updated use '**Back**' button to return to the needed step.



See also

Schema Send Email Wizard
Schema Print Report Wizard
Schema Notify by Email
Bounced Emails Schema
Jobs Schema

Bounced Emails Schema

Bounced Emails feature can be used for sorting out bounced emails into a separate group for further checking and parsing. It might happen that the wrong email address was specified for your contact or email is no longer available or was blocked by a spam blocker. This tool will help you to sort out those emails and double check details for the contacts whom such emails are assigned to. Unsubscribe requests can be also processed with bounced emails schemas.

To create such schema you will need to follow Bounced Email Wizard steps and specify all required settings, such as your mail server and mailbox details, settings for bounced emails groups and unsubscribe settings. To start creating bounced email schema you need to follow **'Bounced Emails'** tab in your Outreach|IT program and click button:

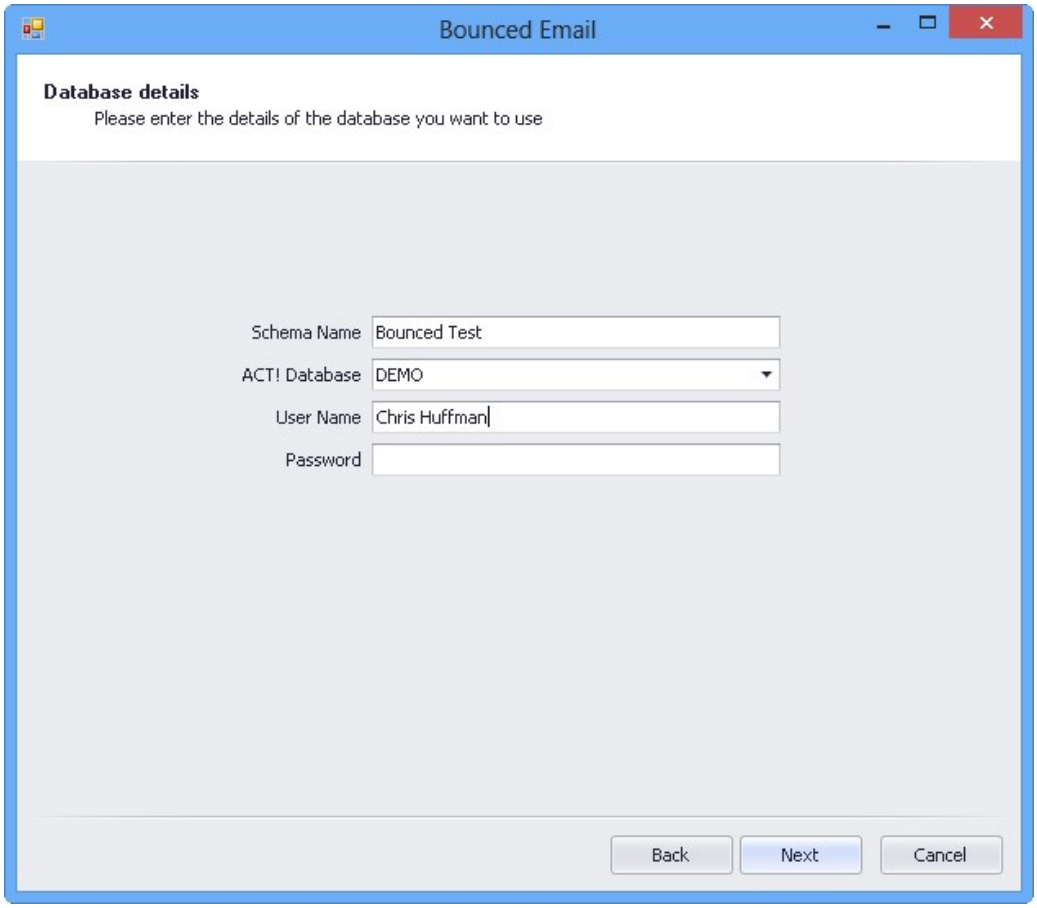
See also

Schema Send Email Wizard
Schema Print Report Wizard
Schema Notify by Email
Send Fax Schema
Jobs Schema

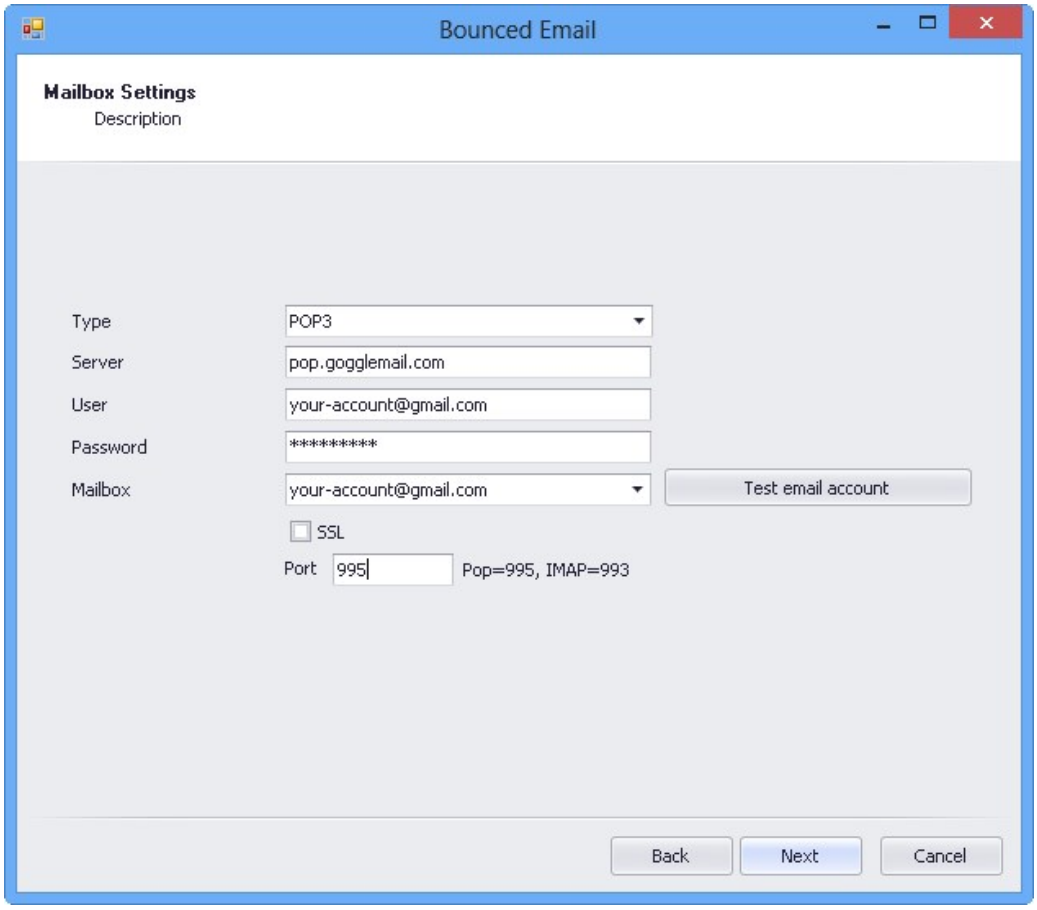
Bounced Emails Wizard

After clicking button on the Bounced Emails Tab the Wizard will start.

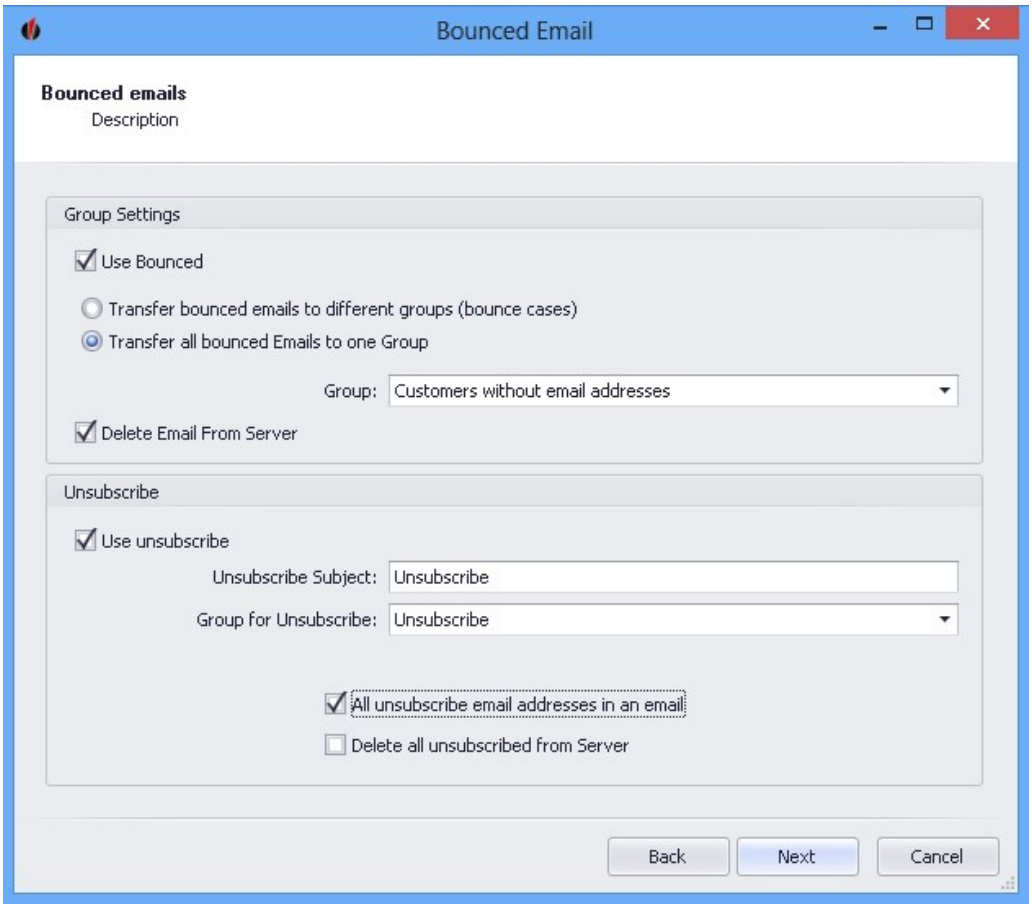
On the following screen you should your database connection settings:



On the following screen mailbox settings should be specified:



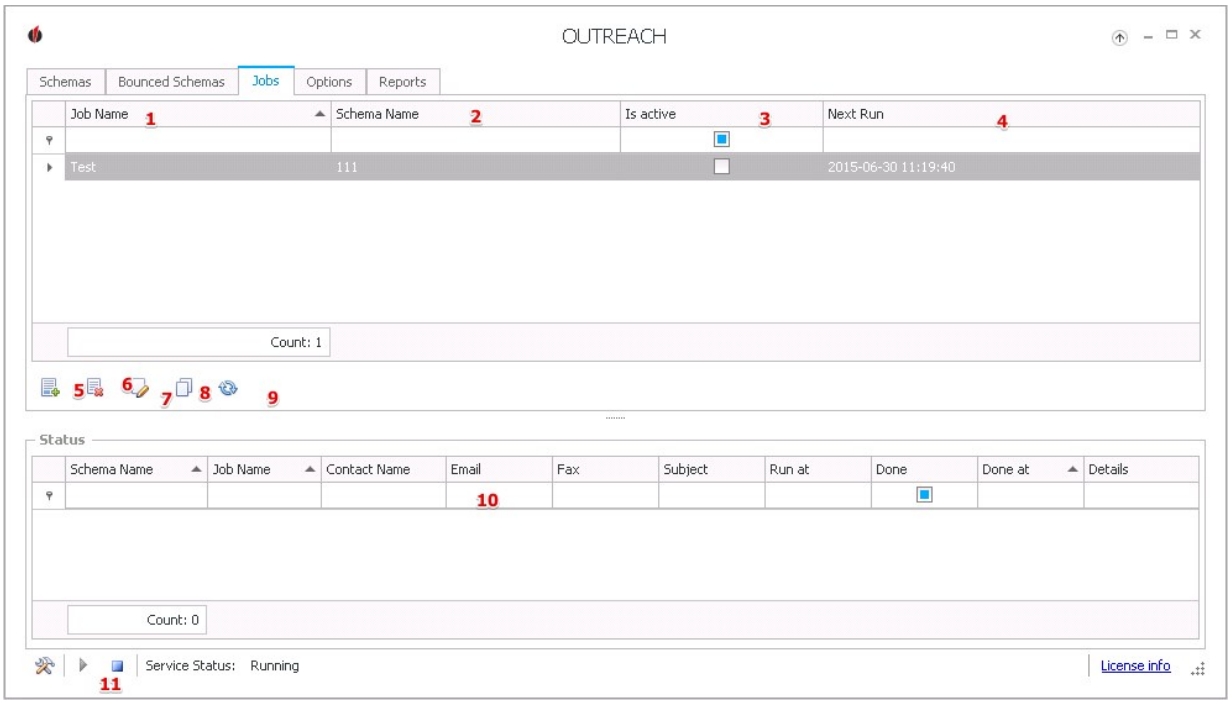
On the **Bounced emails** screen you can select a group emails are transferred to, enable unsubscribe option and specify a group for unsubscribe emails requests.
'Use Bounced' - enable this option if you would like to parse the bounced emails and configure settings for them
'Transfer bounced emails to different groups (bounce cases)' - emails will be transferred to the groups where contacts belong to
'Transfer all bounced emails to one Group' - All bounced emails will be transferred to the selected group
'Delete Email From Server'- check this option if you would like to remove emails from server after processing them
'Use Unsubscribe' - Check this option if you would like to enable unsubscribe option and filter unsubscribe requests
'Unsubscribe Subject' - Define the subject for your unsubscribe emails
'Group for unsubscribe' - Define here the group for unsubscribe emails
'All unsubscribe email addresses in an email' - Check this option if all email addresses mentioned in the email should be added to the unsubscribe list
'Delete all unsubscribed from the server' - Remove emails from the server after processing them



See also

Jobs Schema

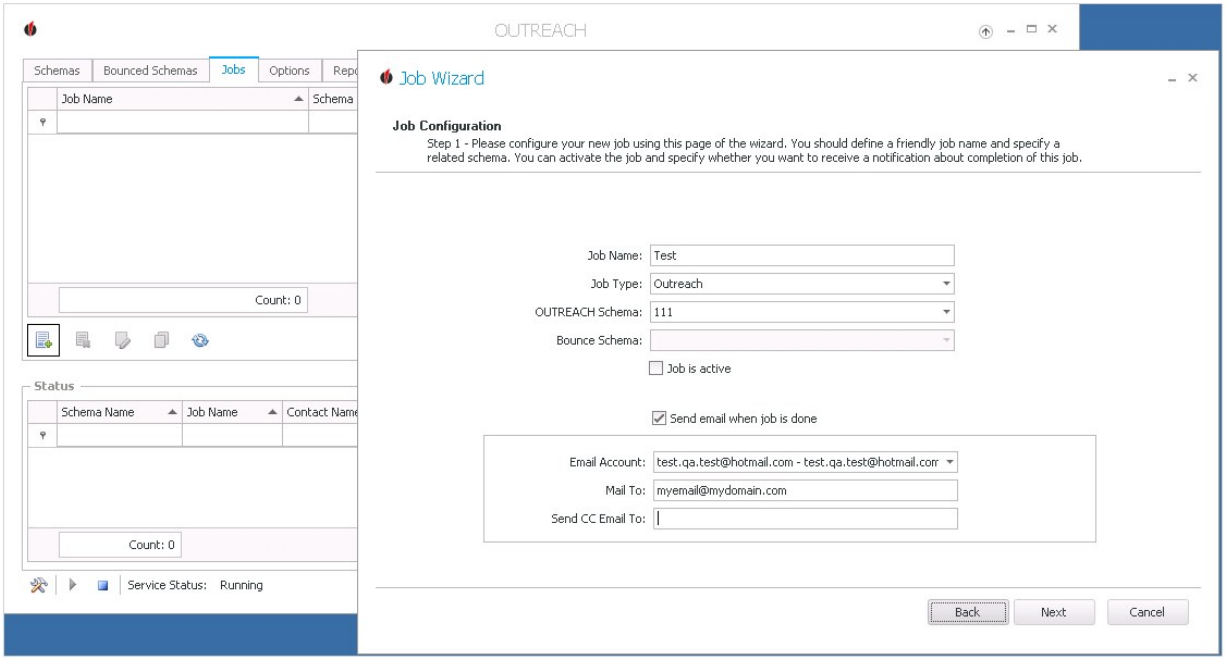
In this section you can set the jobs on executing your Outreach Schemas:



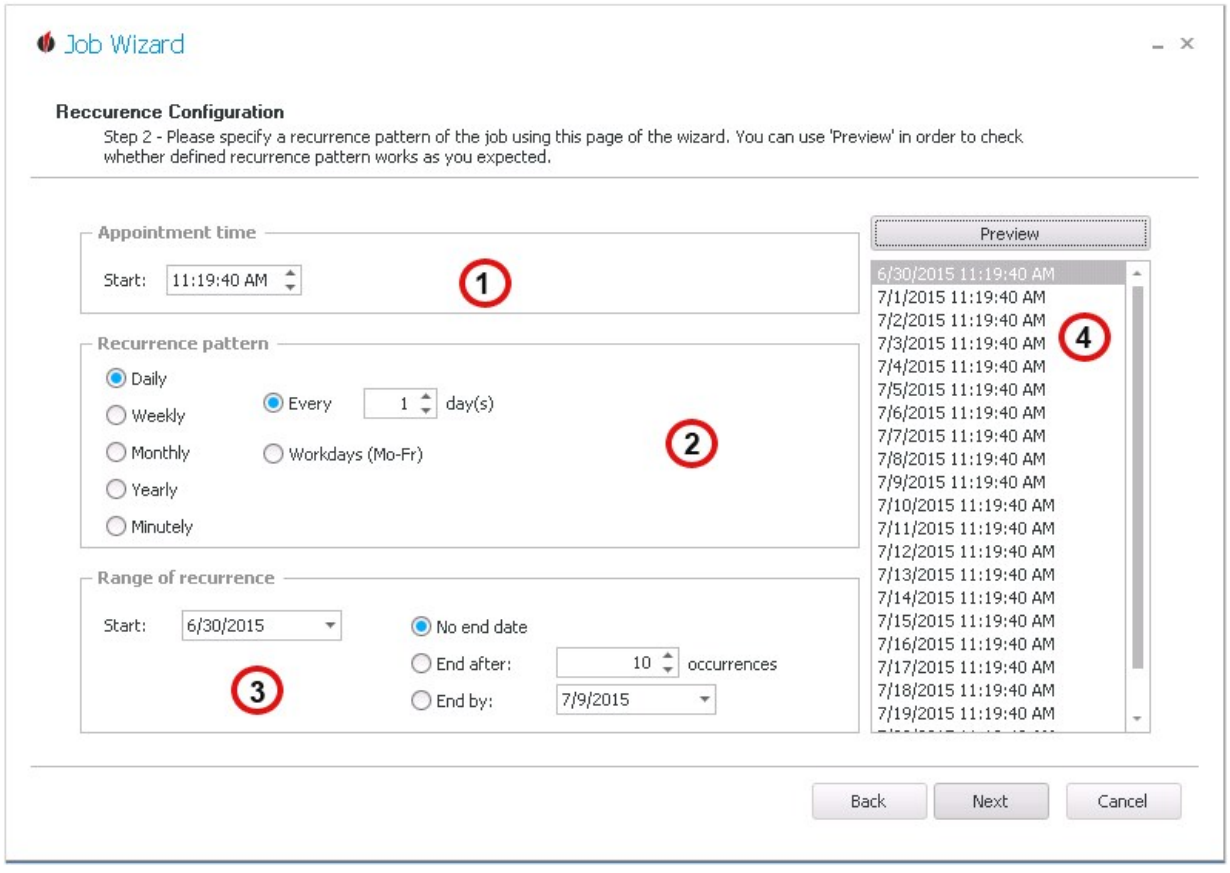
1. Job Name - This column shows the name of your job
2. Schema Name - This column shows the name of your schema
3. Is Active - This column shows if the job is active
4. Next Run- This column shows when the job should be executed.
5. Click this button to create a new schema
6. By clicking on this button the selected schema will be removed
7. Use this button to edit the selected schema settings
8. This command copies a selected schema
9.This button refreshes the list of schemas
10. The list of executed jobs
11. This command line allows to start / stop service and launch 'Local settings' window

To create a job schema, click button, then follow the Job Schema Wizard steps.

On the following dialog, please specify the name for your Job, select the Schema you'd like to execute, Job type - Outreach or Bounced emails schema. Add a checkmark to the box '**Job is active**' if you'd like to activate this schema and add email details in case you'd like to get notified when the job is done.



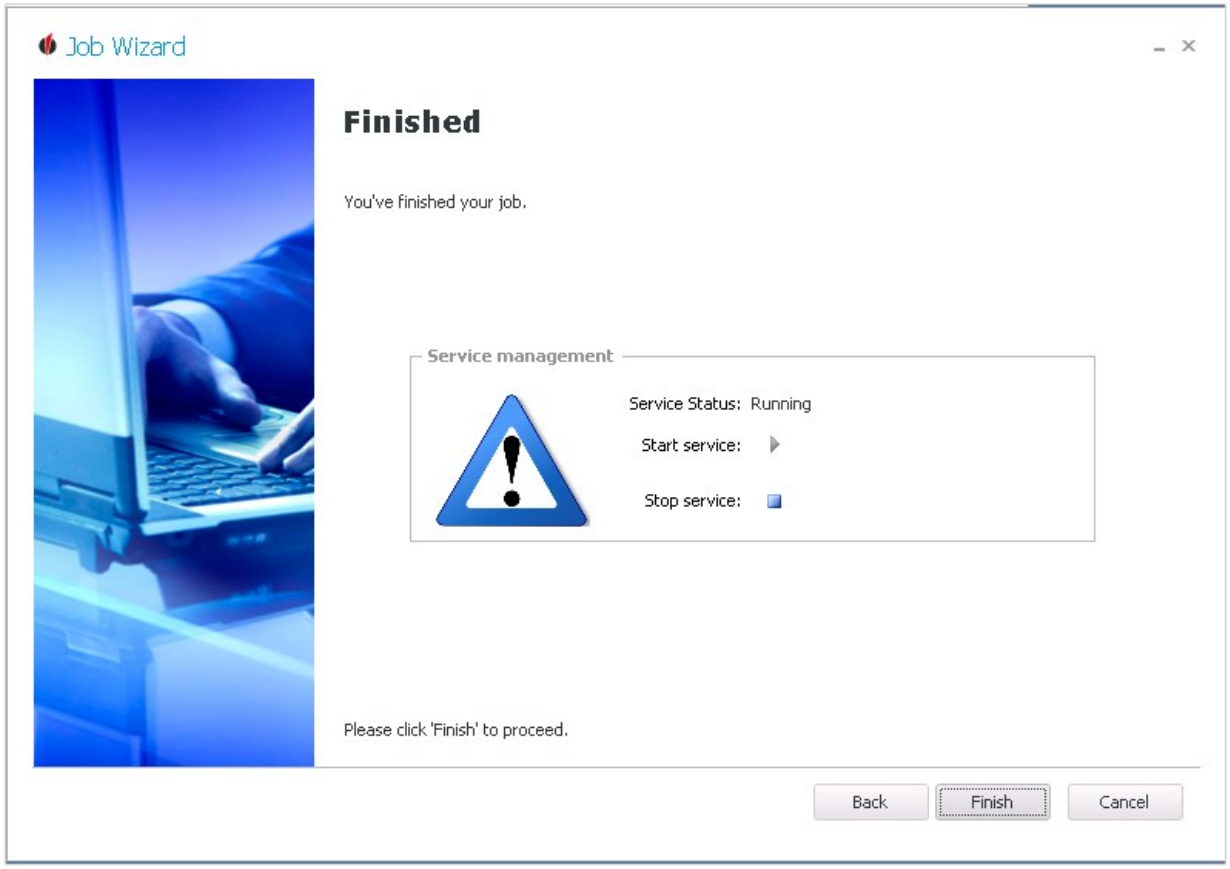
On the **Recurrence** window recurrence settings can be defined.



1. '**Appointment time**' - the time when the job should start
2. '**Recurrence pattern**' - how often the task should be performed
3. '**Range of recurrence**' - the date when the task execution should start and when it should be completed.

4. '**Preview**' - after clicking on the 'preview' button you will see the date and time when the task will be performed. Just in case you need to double check everything before starting the task

After creating the schema you will get the following window where you can start / stop your job:

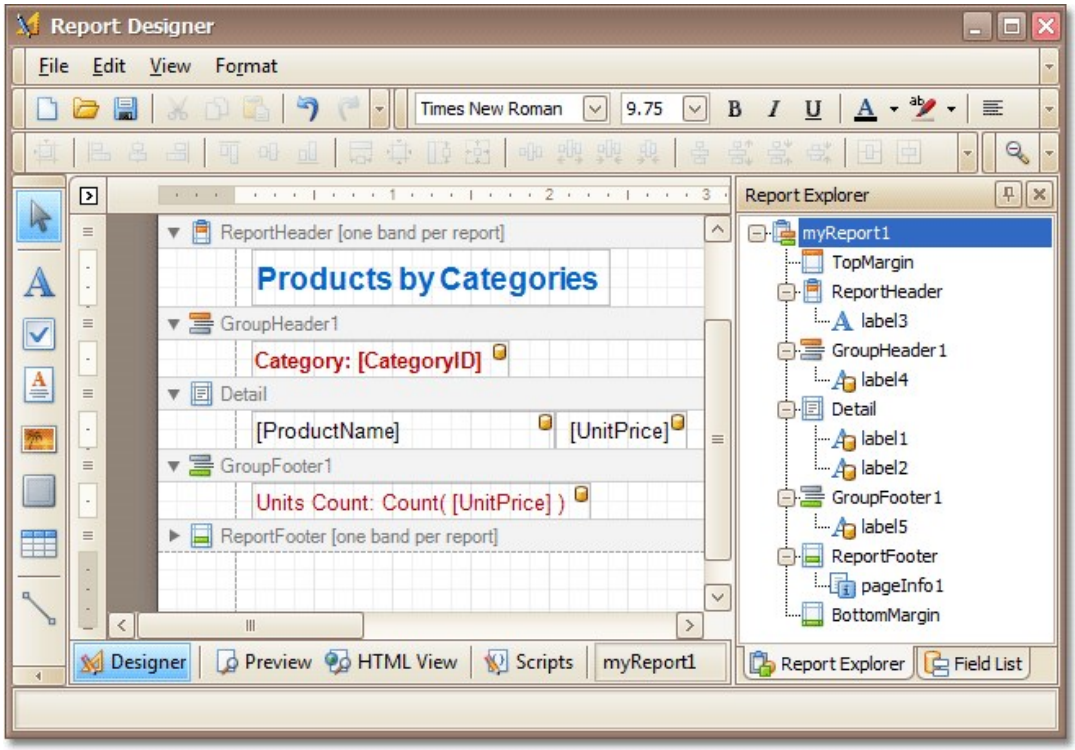


See also

Schema Send Email Wizard
Schema Print Report Wizard
Schema Notify by Email
Send Fax Schema
Bounced Emails Schema

Report Designer

This guide contains information about the basic principles of creating reports with Report Designer.
The Report Designer allows you to create new reports from scratch, bind them to data, and even pass them to
another workstation and load them into another instance of the report designer. In addition to report editing
capabilities, it allows you to display its Print Preview and send its output to a printer or export it to a file on disk.



The following sections are available in this guide:

- Report Editing Basics
- Create Reports
- Report Designer Reference
- Preview and Print Reports

See also

Welcome
Outreach Installation
Email Marketing with Outreach|IT

Licensing
RDP License
System Requirements
About Outreach|IT
Quick Start
How to Use OUTREACH|IT
Outreach Settings
Creating Reports
How to create email template
How to create Outreach Schemas
Report Editing Basics
Create Reports
Report Designer Reference
Preview and Print Reports
Support

Report Editing Basics

This section describes the most basic tasks you may encounter when initiating a report edit in the Report Designer.
The following documents are available in this section:

Report Editing Basics

- Back Up the Current Layout Before Modifying It
- Change Element Layout in Your Report
- Change Fonts and Colors of Report Elements
- Delete Report Elements

Providing Data

- Add or Modify Static Information in Your Report
- Use Mail Merge in Report Elements
- Add Calculated Fields to a Report
- Add Parameters to a Report

Data Representation

- Change Value Formatting of Report Elements
- Change or Apply Data Sorting to a Report
- Change or Apply Data Filtering to a Report
- Change or Apply Data Grouping to a Report

Additional Features

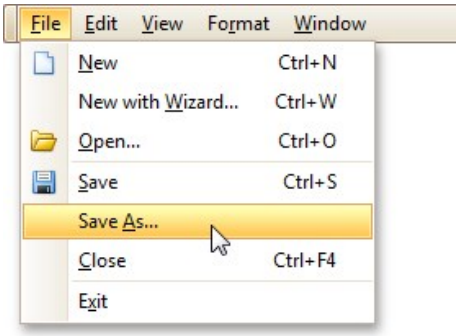
- Add Totals to a Report
- Add Page Numbers and System Information to a Report
- Create or Modify Watermarks of a Report

See also
Welcome
Outreach Installation
Email Marketing with Outreach|IT
Licensing
RDP License
System Requirements
About Outreach|IT
Quick Start
How to Use OUTREACH|IT
Outreach Settings
Creating Reports
How to create email template
How to create Outreach Schemas

Report Designer
Create Reports
Report Designer Reference
Preview and Print Reports
Support

Report Backup

To guarantee that you will be able to revert your report to its original state, you need to create a backup copy.
Then, you can apply changes without worrying that it will be hard to restore your report, in case something
breaks. **To save a copy of your report**, in the Main Menu, select File / Save As.



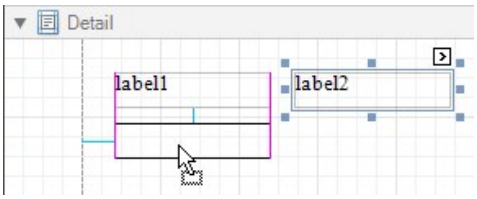
Then, in the invoked standard Save File dialog, specify the folder and file name. To save the current layout of your report, in the Main Menu select File / Save, or press CTRL+S. In thiscase, the report will be saved in the application's current folder. After your report is saved, its path is displayed in the Report Designer's title bar. To load a previously saved report, in the Main Menu, click File | Open, or press CTRL+O. The standard Open File dialog will allow you to locate and open report files.

See also

Change Elements in your Report
Change Fonts and Colors of Report Elements
Delete Reports
Add or Modify Static Information in Your Report
Use Mail Merge in Report Elements
Add Calculated Fields to a Report
Add Parameters to a Report
Change Value Formatting of Report Elements
Change or Apply Data Sorting to a Report
Change or Apply Data Filtering to a Report
Change or Apply Data Grouping to a Report
Add URLs to a report
Add Totals to a Report
Add Page Numbers and System Information to a Report
Create or Modify Watermarks of a Report

Change Elements in your Report

To select a control, simply click it. To select the next control in tab order, press TAB. To select the previous control in tab order, click SHIFT + TAB. Individual controls can be moved, using either mouse or keyboard.



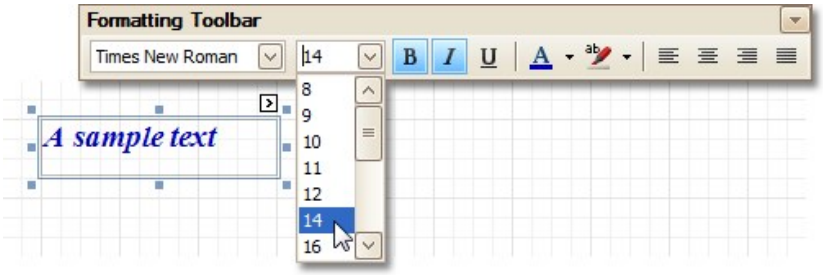
To resize a control using the mouse, select it, and then drag a rectangle drawn on its edge or corner.

To resize an element using the keyboard, press SHIFT+ARROW or CTRL+SHIFT+ARROW. To select multiple elements, do one of the following:

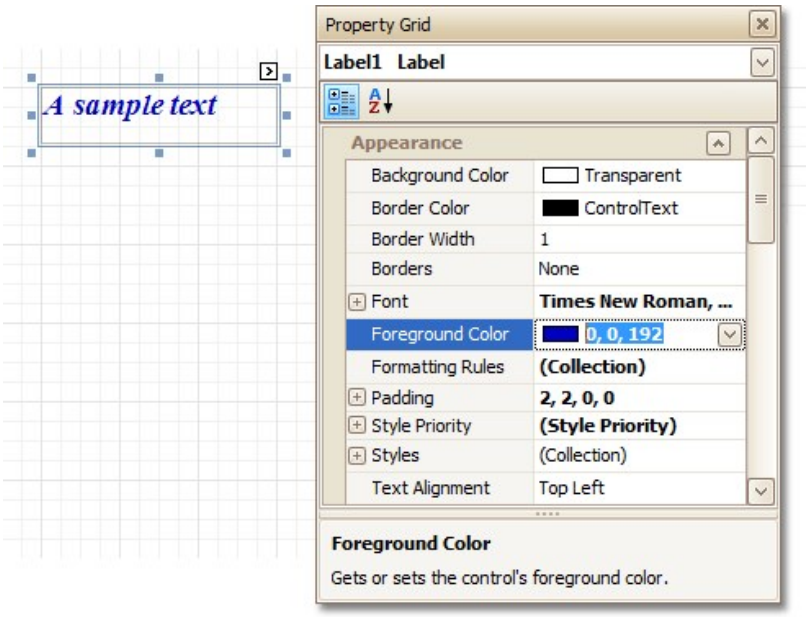
- Click elements while holding CTRL or SHIFT.
- Click on a blank space and drag the mouse to create a selection frame. When the mouse button is released, all controls within the selection frame's boundaries will be selected. In this case, the previous selection is cleared.

Change Fonts and Colors of Report Elements
To change fonts and colors (as well as paddings, text alignment and other appearance properties) of a report
control or band, select this element and do one of the following:

- Use the Formatting Toolbar.



- Use the Property Grid, where all appearance-related properties are located under the Appearance
category.



Note that the appearance settings of a band are applied to all controls contained within it.

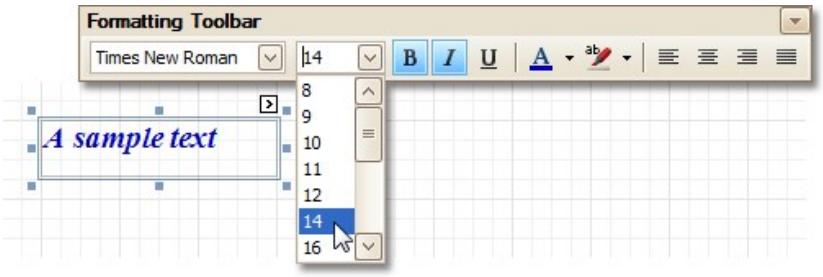
See also

Report Bakup
Change Fonts and Colors of Report Elements
Delete Reports
Add or Modify Static Information in Your Report
Use Mail Merge in Report Elements
Add Calculated Fields to a Report
Add Parameters to a Report
Change Value Formatting of Report Elements
Change or Apply Data Sorting to a Report
Change or Apply Data Filtering to a Report
Change or Apply Data Grouping to a Report
Add URLs to a report
Add Totals to a Report
Add Page Numbers and System Information to a Report
Create or Modify Watermarks of a Report

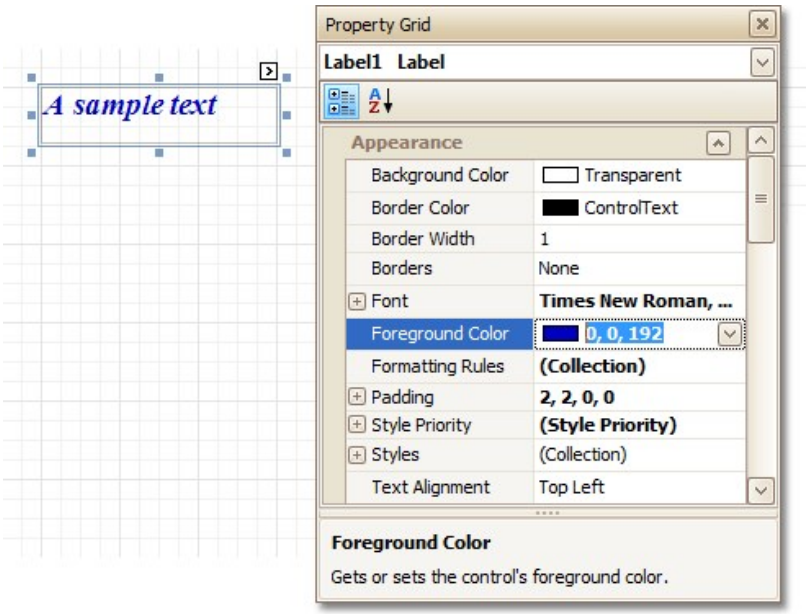
Change Fonts and Colors of Reports Elements

To change fonts and colors (as well as paddings, text alignment and other appearance properties) of a report control or band, select this element and do one of the following.

- Use the Formatting Toolbar.



- Use the Property Grid, where all appearance-related properties are located under the Appearance category.



Note that the appearance settings of a band are applied to all controls contained within it.

When it's required to apply styles in bulk, we recommend using common style templates, which also can be stored
in an external style sheet file, and applied to multiple reports. In addition, this allows you specify separate odd/
even s tyles, to improve your reports' readability. Another noteworthy option, is the capability to conditionally
change the appearance of report elements based on a certain logical expression (e.g. if a control's value satisfies
some rule).

See also

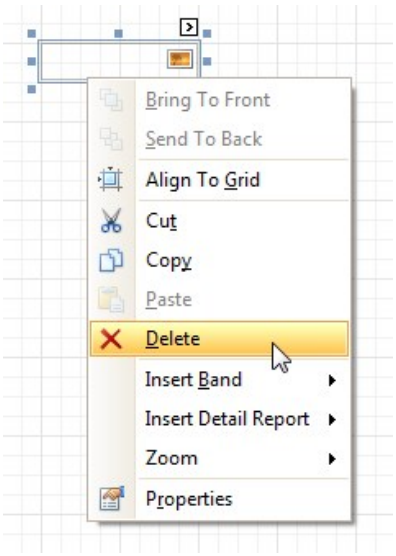
Report Bakup
Change Elements in your Report
Delete Reports
Add or Modify Static Information in Your Report
Use Mail Merge in Report Elements
Add Calculated Fields to a Report
Add Parameters to a Report
Change Value Formatting of Report Elements

Change or Apply Data Sorting to a Report
Change or Apply Data Filtering to a Report
Change or Apply Data Grouping to a Report
Add URLs to a report
Add Totals to a Report
Add Page Numbers and System Information to a Report
Create or Modify Watermarks of a Report

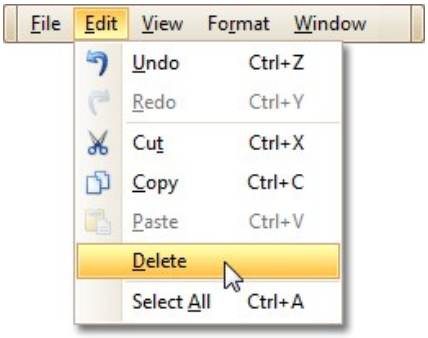
Delete Reports

To delete a report element (band or control), select it in the Design Panel or Report Explorer (to select multiple
elements, hold down SHIFT while selecting), and then do one of the following.

- Press **DELETE**.
- Right-click the report element, and in the invoked **Context Menu**, choose **Delete**.



- In the Main Menu, select **Edit | Delete**.

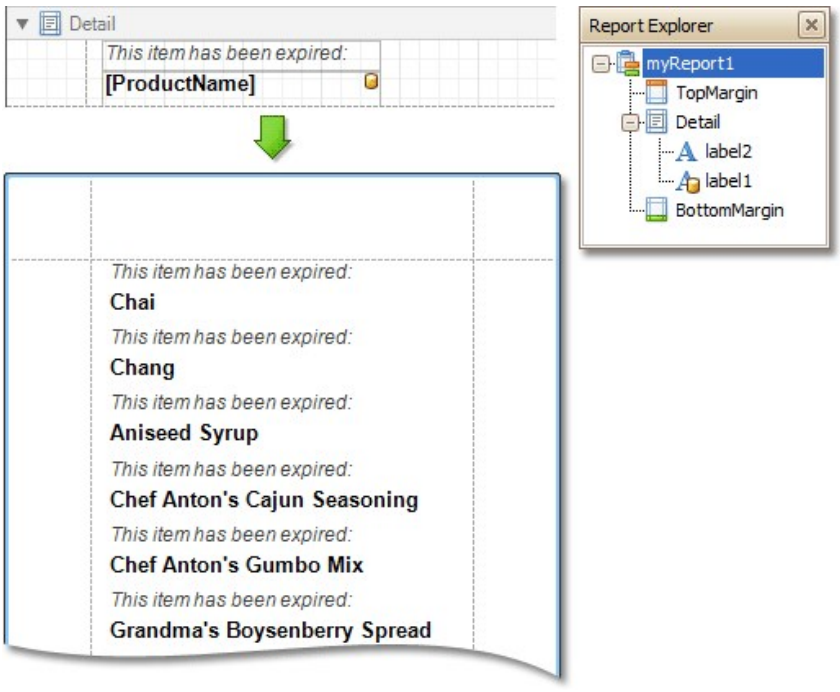


See also

Report Bakup
Change Elements in your Report
Change Fonts and Colors of Report Elements
Add or Modify Static Information in Your Report
Use Mail Merge in Report Elements
Add Calculated Fields to a Report
Add Parameters to a Report
Change Value Formatting of Report Elements
Change or Apply Data Sorting to a Report
Change or Apply Data Filtering to a Report
Change or Apply Data Grouping to a Report
Add URLs to a report
Add Totals to a Report
Add Page Numbers and System Information to a Report
Create or Modify Watermarks of a Report

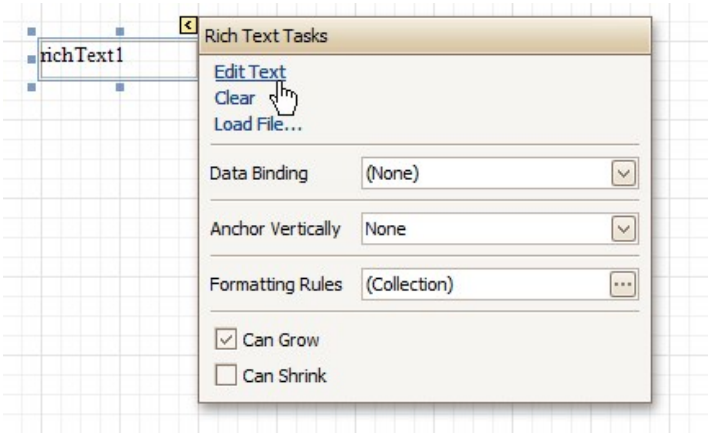
Add or Modify Static Information in Your Report

In a report, **static** and **dynamic** information is displayed using appropriate controls. **Dynamic information** changes through a report, it can include values from a database (which comprise the main report
data) or service information (such as current user name or page numbers).
Static information is text or images that aren't obtained from a data source, and therefore don't change through
the report, and don't depend on the current computer. Static information can be printed only once (e.g. in a
Report Header), can repeat on each page (e.g. in a Page Header) or can repeat with every entry in your report's
data source.



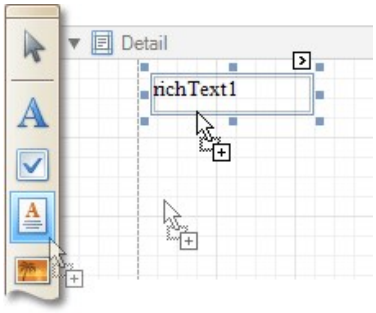
Change Static Information
Text elements (e.g. Labels and Rich Text Boxes) allow in-place editing of their content. Simply double-click an
element and activate the editor.

Another way to change a control's static information, is by clicking its Smart Tag. Then, the invoked actions list will
contain a link (or, a button) allowing you to edit this control's content.

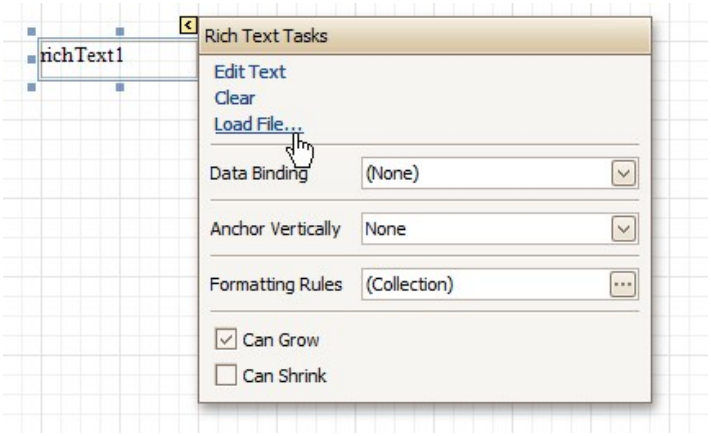


Load Static Information to Your Report
To load static information to your report from an external file, drop an appropriate control from the Control Toolbox
(e.g. Label, Rich Text Box or Picture Box). After it is properly positioned, edit its content using the Smart Tag.
For instance, the following instructions describe how to display a rich text (a formatted text with embedded
images) into your report.

- Drop the Rich Text control from the Toolbox onto the Detail band.



- To load content from an external RTF or TXT file, select the created control and click its Smart Tag. In the
  invoked actions list, click the Load File... link.



Then, in the invoked dialog, locate the required file, and click Open.

See also

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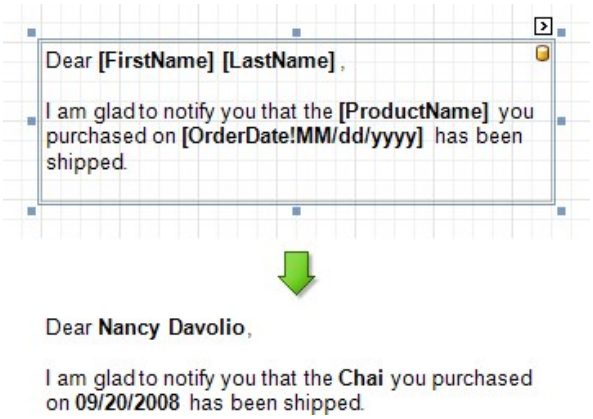
Use Mail Merge in Report Elements

The mail merge feature allows you to combine both static and dynamic content within the same control (e.g. to
append some text prefix or postfix to a value obtained from a database), or even bind a control to multiple data
fields at one time.

Mail merge is available for the following controls.

- Bar Code
- Check Box
- Label
- Rich Text
- Table Cell
- Zip Code

To embed dynamic data into a control's static content, type in data field names surrounded by [square brackets].


Dear [FirstName] [LastName],
I am glad to notify you that the [ProductName] you purchased on [OrderDate!MM/dd/yyyy] has been shipped.
Dear Nancy Davolio,
I am glad to notify you that the Chai you purchased on 09/20/2008 has been shipped.

See also

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Change Value Formatting of Report Elements
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Change or Apply Data Filtering to a Report
Change or Apply Data Grouping to a Report
Add URLs to a report
Add Totals to a Report
Add Page Numbers and System Information to a Report
Create or Modify Watermarks of a Report

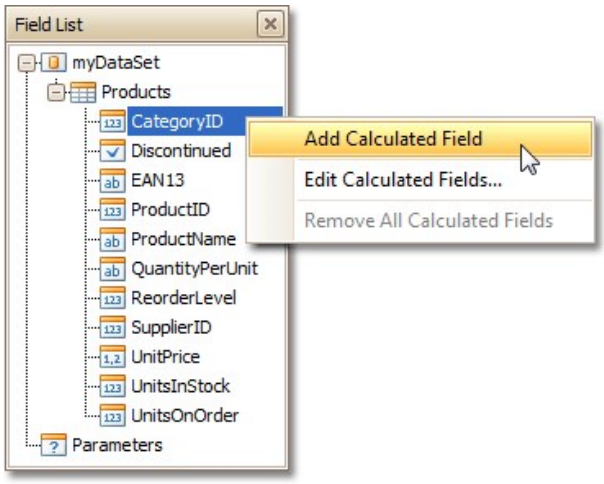
Add Calculated Fields to a Report

This document demonstrates how to add a calculated field to a report. The main purpose of calculated fields is to perform pre-calculations (of virtually any level of complexity) over data fields. To learn how to easily perform simple calculations within a single data field, refer to Add Totals to a Report.

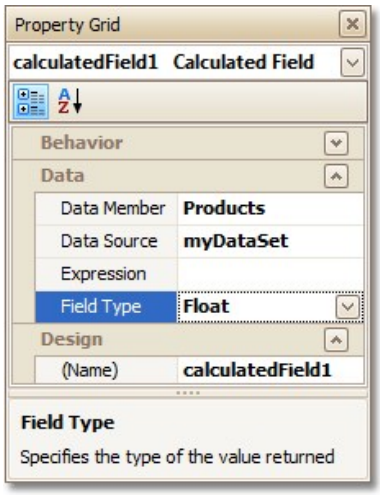
In the Report Designer, a calculated field is similar to an ordinary data field (e.g. you can bind controls to it, and group, sort and filter your report against it).

To add a calculated field to your report, follow the instructions below:

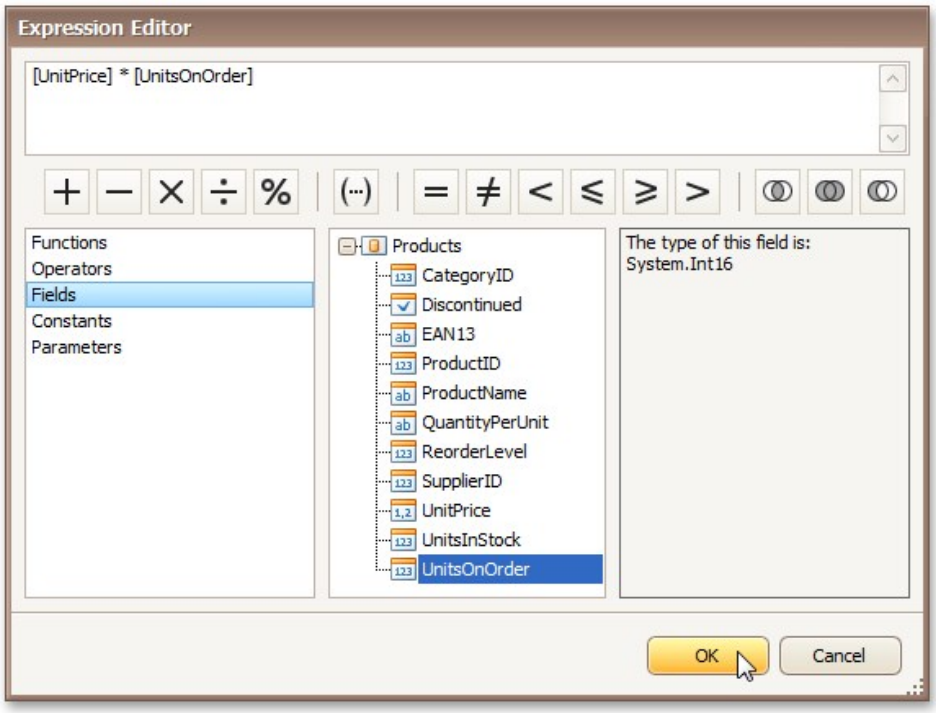
1.To create a calculated field, in the Field List, right-click any data member, and on the invoked menu,
choose **Add Calculated Field**.



2.In the Field List, select the created field to show its properties in the Property Grid. Among these
options, make sure to change the **Field Type** property to an appropriate value.



3.Now, let's create an expression for the calculated field.
Click the ellipsis button in the **Expression** section, to invoke the Expression Editor. You can also invoke
this dialog by right-clicking your calculated field within the Field List and selecting **Edit Expression...**

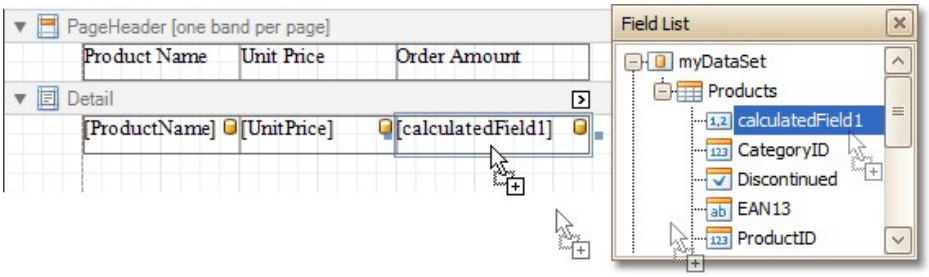


Click Fields to see the field list. Double-click field names to add them to the expression string. Use the
toolbar to add operators between field names.

Note that it's also possible to employ parameters in a calculated field's expression.

To close the dialog and save the expression, click **OK**.

4.Finally, drag the calculated field from the Field List onto the required band, just like an ordinary data
field.



The report with a calculated field is now ready. Switch to the Preview Tab, and view the result.

Product Name	Unit Price	Order Amount
Chang	$19.00	$760.00
Aniseed Syrup	$10.00	$700.00
Queso Cabrales	$21.00	$630.00
Sir Rodney's Scones	$10.00	$400.00
Gorgonzola Telino	$12.50	$875.00
Mascarpone Fabioli	$32.00	$1280.00
Gravad lax	$26.00	$1300.00
Ipoh Coffee	$46.00	$460.00
Røgede sild	$9.50	$665.00
Chocolade	$12.75	$892.50
Maxilaku	$20.00	$1200.00
Gnocchi di nonna Alice	$38.00	$380.00

See also
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Create or Modify Watermarks of a Report

Add Parameters to a Report

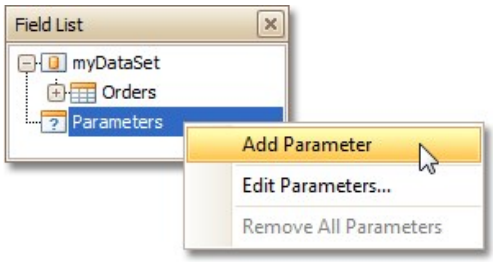
For your report, you can employ parameters, which can be requested each time the report is being previewed.
And, based on specified values, the report will then being filtered.

In this example, we'll create two date-time parameters, to filter out orders which don't fall

in the specified range,
from the report.

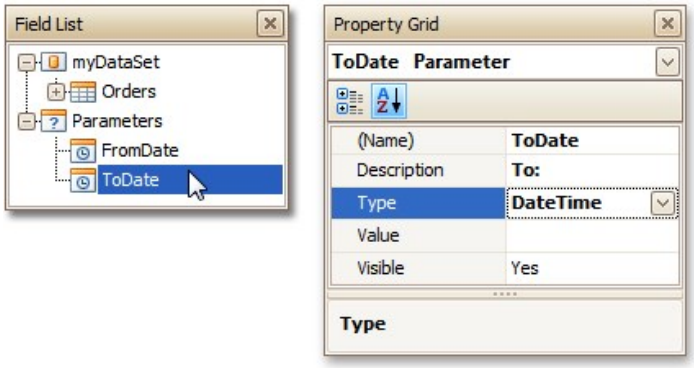
To add parameters and filter your report based on their values, follow the steps below.

1.In the Field List window, right-click over the **Parameters** section and in the invoked menu, click **Add Parameter**.



Repeat this action to create the second parameter.

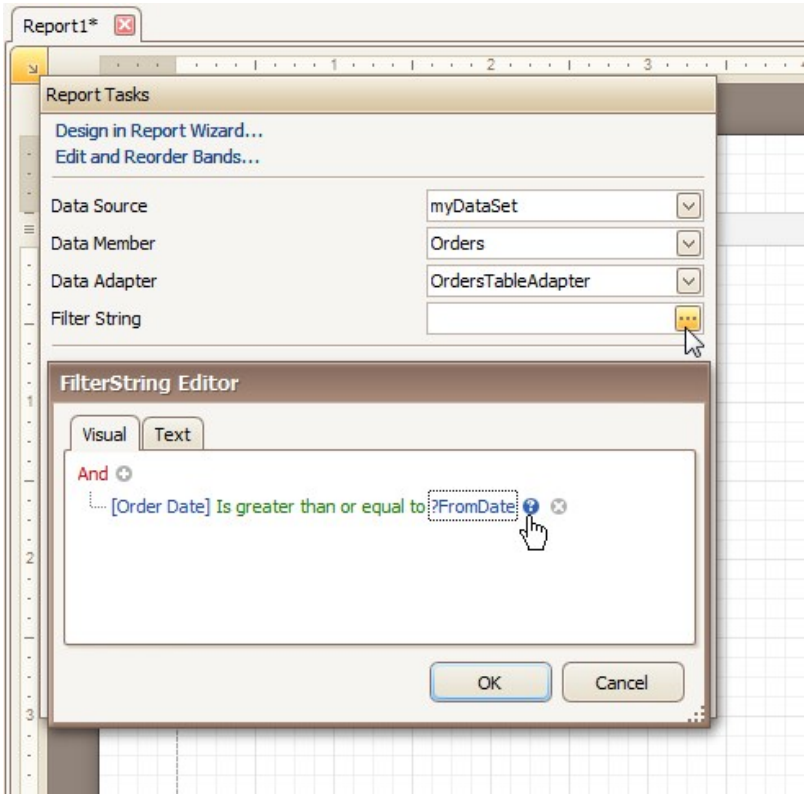
2.In the Field List, select the first parameter, and in the Property Grid, set its (Name) and Description.
And make sure to set its Type to an appropriate value.
Then, repeat this step for the second parameter.



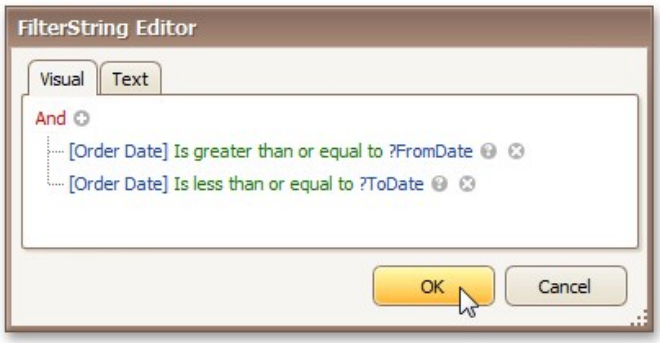
Now, every time your report is previewed, you will be asked to specify two dates.

Note
In Print Preview, if a report's **Request Parameters** option is set to **Yes**, its document is not generated until you have
submitted values of all visible parameters via the **Parameters UI**.
The following instructions explain how to use parameters to filter your report's data.

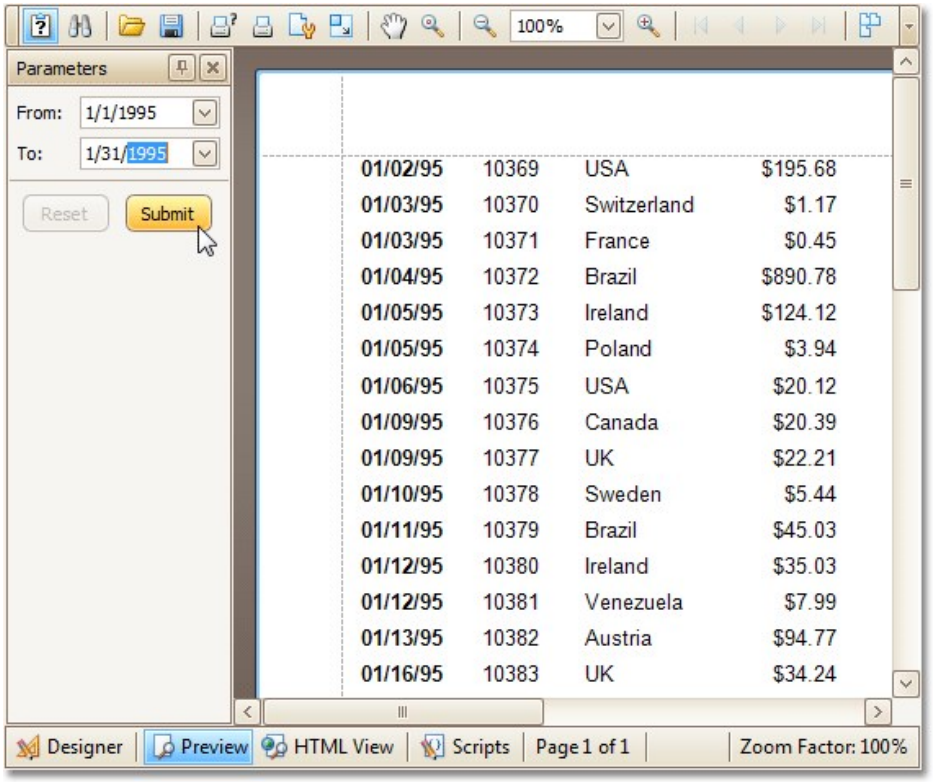
3.Click your report's Smart Tag, and in the invoked actions list, click the ellipsis button for the Filter String
entry. Then, in the invoked **Filter String Editor**, construct an expression where a data field is compared
with the created parameters. To access parameters, click the icon on the right until it turns into a
question mark.



The complete filtering expression will then look like this.



The parameterized report is now ready. Switch to the Preview Tab, and in the **Parameters** section, define the
required values and click **Submit**.



See also
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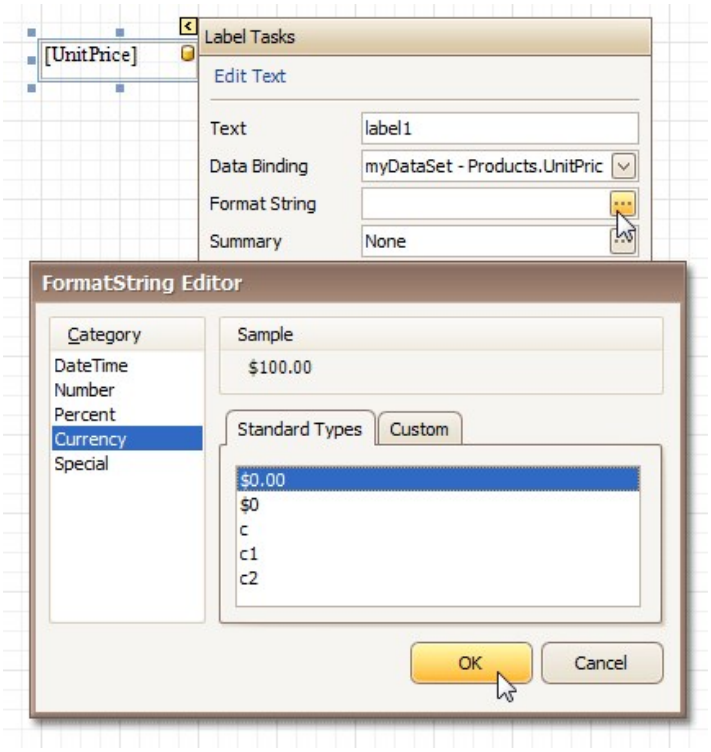
Home > Report Editing Basics > Change Value Formatting of Report Elements

Change Value Formatting of Report Elements

To apply value formatting for a data-bound control's content (e.g. for it to be treated as currency, or date-time
content), locate this control, click its Smart Tag, and in the invoked actions list, click the ellipsis button for the

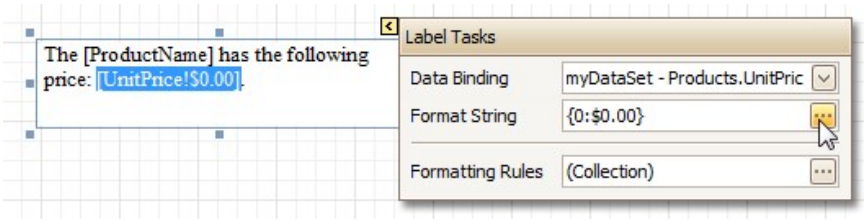
Format String entry.

Then, in the invoked format string editor, choose one of the predefined formatting styles, or specify a custom one.



To quit the dialog and apply the changes, click **OK**.

Similarly, when the mail-merge is employed for a control's dynamic content, to apply a value formatting to an
embedded data field, select it in the in-place editor, and click the control's smart tag. Then, in the invoked actions
list, specify the required format.



See also
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Change Elements in your Report
Change Fonts and Colors of Report Elements
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Add or Modify Static Information in Your Report
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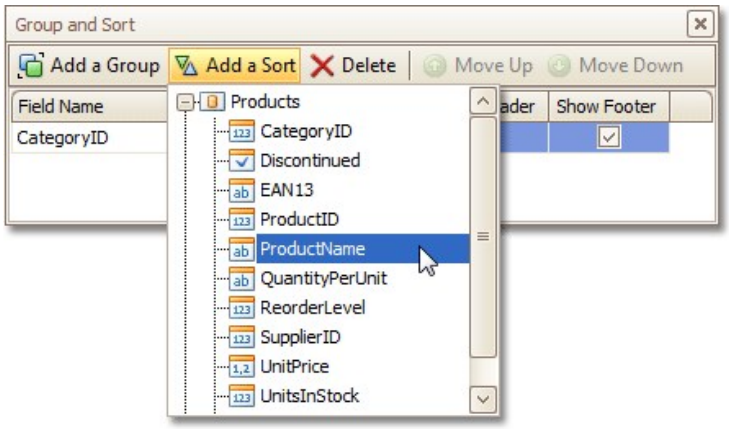
Create or Modify Watermarks of a Report

Change or Apply Data Sorting to a Report

This document demonstrates how to sort a report's data. Note that as with data grouping, sorting can be
performed only if a report is bound to a data source.

To sort records in a data-aware report, do the following:

1.Switch to the **Group and Sort Panel**, and click **Add a Sort**. In the invoked list, choose a data member
across which the report is to be sorted.



2.To manage the sorting order (ascending or descending), use the Sort Order drop-down list. And, if multiple sorting criteria are specified, you can define the priority for each one, by selecting it in
the Group and Sort Panel, and using the **Move Up** and **Move Down** buttons.

The sorting is now applied. Switch to the **Preview Tab**, and view the result.

Products by Categories

Category: 1

Chai	$18.00
Chang	$19.00
Chartreuse verte	$18.00
Côte de Blaye	$263.50
Guaraná Fantástica	$4.50
Ipoh Coffee	$46.00
Lakkalikööri	$18.00
Laughing Lumberjack Lager	$14.00
Outback Lager	$15.00
Rhönbräu Klosterbier	$7.75
Sasquatch Ale	$14.00
Steeleye Stout	$18.00
	$455.75

Category: 2

Aniseed Syrup	$10.00
Chef Anton's Cajun Seasoning	$22.00
Chef Anton's Gumbo Mix	$21.35

See also
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Change Elements in your Report
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Add Totals to a Report
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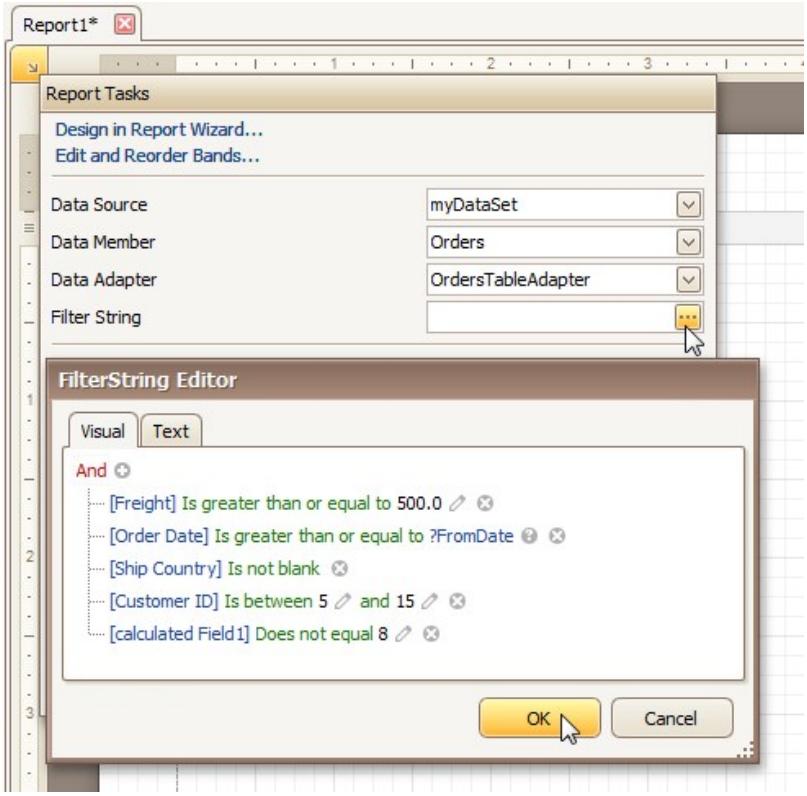
Create or Modify Watermarks of a Report

Home > Report Editing Basics > Change or Apply Data Filtering to a Report

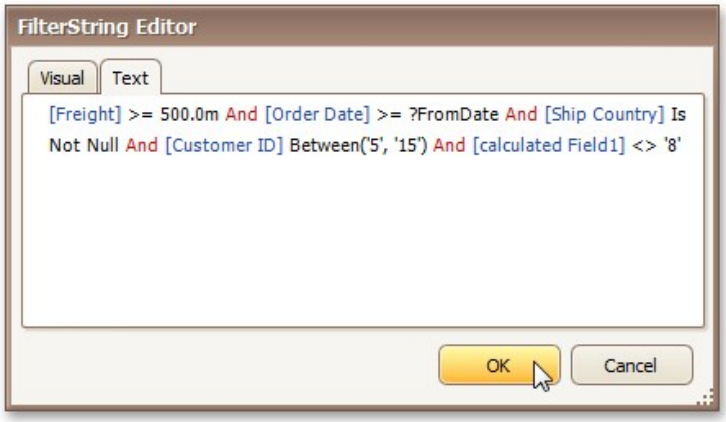
Change or Apply Data Filtering to a Report

For your report, you can specify a filtering expression (of virtually any level of complexity), to exclude excessive or
undesired data.

To filter a report's data, click its **Smart Tag**, and in the invoked actions list, click the ellipsis button for the **Filter
String** entry. Then, in the invoked **Filter String Editor**, construct an expression.



In the **Filter String Editor**, you can either use the Visual expression builder, or specify the expression in **Text**.


FilterString Editor
Visual
Text
[Freight] >= 500.0m And [Order Date] >= ?FromDate And [Ship Country] Is Not Null And [Customer ID] Between('5', '15') And [calculated Field1] <> '8'
OK
Cancel

Note that it is possible to embed parameters into the expression, and also request them each time a report is previewed.
To quit the dialog and save the changes, click OK.

See also
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Change Fonts and Colors of Report Elements
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Create or Modify Watermarks of a Report

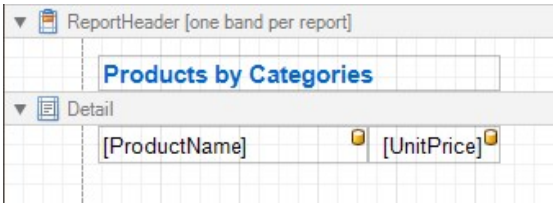
Home > Report Editing Basics > Change or Apply Data Grouping to a Report

Change or Apply Data Grouping to a Report

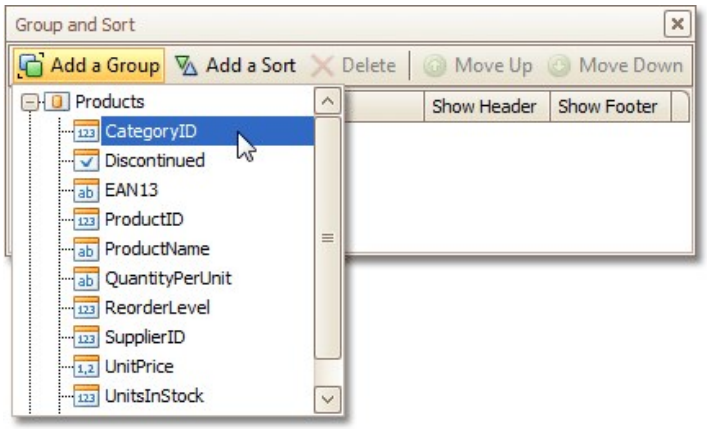
This document demonstrates how to group a report's data. Note that data grouping can be performed only if a
report is bound to a data source.

To group records in a report, do the following:

1.Create a new report and bind it to a data source. In this tutorial, we'll start with the following report

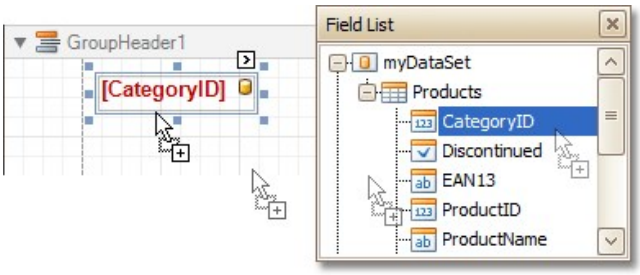


2.Now, switch to the Group and Sort Panel, and click **Add a Group**. In the invoked list, choose a data
member across which the report is to be grouped.

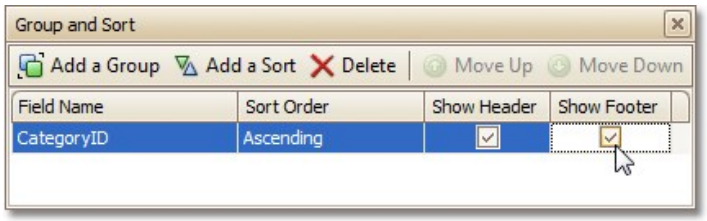


If multiple groups are created, you can specify the priority for each group, by selecting it in the Group
and Sort Panel, and using the **Move Up** and **Move Down** buttons.

3.After this, a Group Header band is added to the report, with the specified data member being set as its
grouping criterion.
Now, it's only left to drop the corresponding item from the Field List onto this band, so that it's displayed
as a header for each group.



4.In addition, you can enable the corresponding Group Footer band, by checking the Show Footer option
in the Group and Sort Panel.



To manage the sorting order of the group's items (ascending or descending), use the Sort Order dropdown
list.

See also

Report Bakup
Change Elements in your Report

Change Fonts and Colors of Report Elements
Delete Reports
Add or Modify Static Information in Your Report
Use Mail Merge in Report Elements
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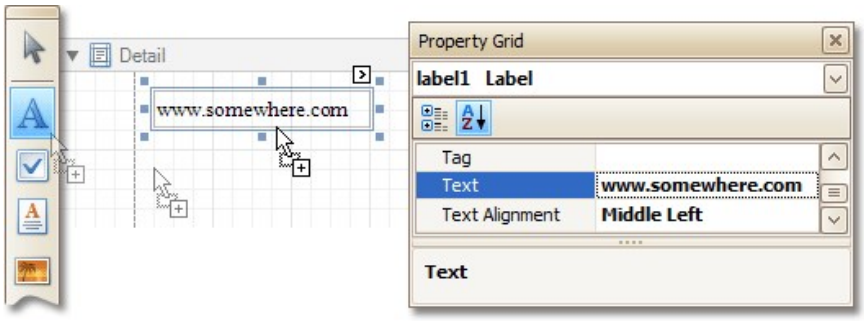
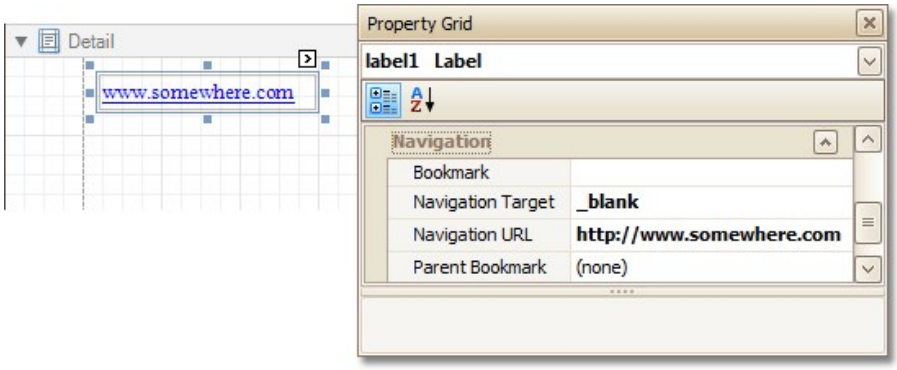
Create or Modify Watermarks of a Report

Add URLs to a report

To insert a hyperlink into your report, do the following.
1.Create a new report.
2.Drop a Label onto the report, and in the Property Grid, change its Text to the one required for the link.



In addition, to make the Label look like a typical link, you can change its appearance appropriately (e.g.
make it blue and underlined).
3.Now, set its Navigation Target to the required value (_blank, _parent, _search, _self, or _top), and
define the required Navigation URL.



The hyperlink is now ready. Switch to the Preview Tab (or, HTML View Tab), and view the

result.

See also

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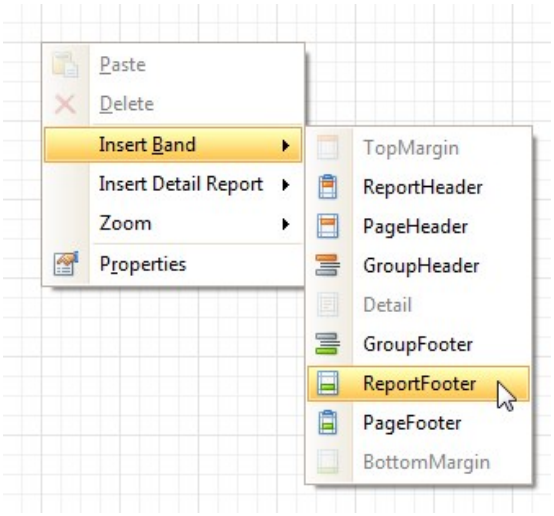
Delete Reports
Add or Modify Static Information in Your Report
Use Mail Merge in Report Elements
Add Calculated Fields to a Report
Add Parameters to a Report
Change Value Formatting of Report Elements
Change or Apply Data Sorting to a Report
Change or Apply Data Filtering to a Report
Change or Apply Data Grouping to a Report
Add Totals to a Report
Add Page Numbers and System Information to a Report
Create or Modify Watermarks of a Report

Add Totals to a Report

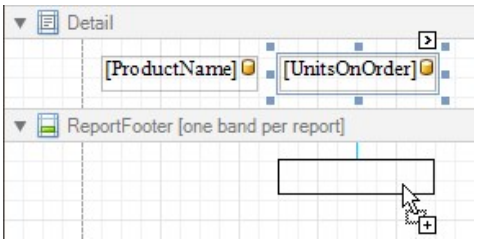
With Report Designer, you can force a data-bound control to calculate one of the standard summary functions (
Average, Summary, Count, Running Summary, Percentage, Max or Min).
To calculate summaries (totals) within a report, follow the instructions below.

1.To display the result at the bottom of a report, the Report Footer band should be present. To add it,
right-click anywhere over the report's area and in the invoked Context Menu, select Insert Band |
ReportFooter.



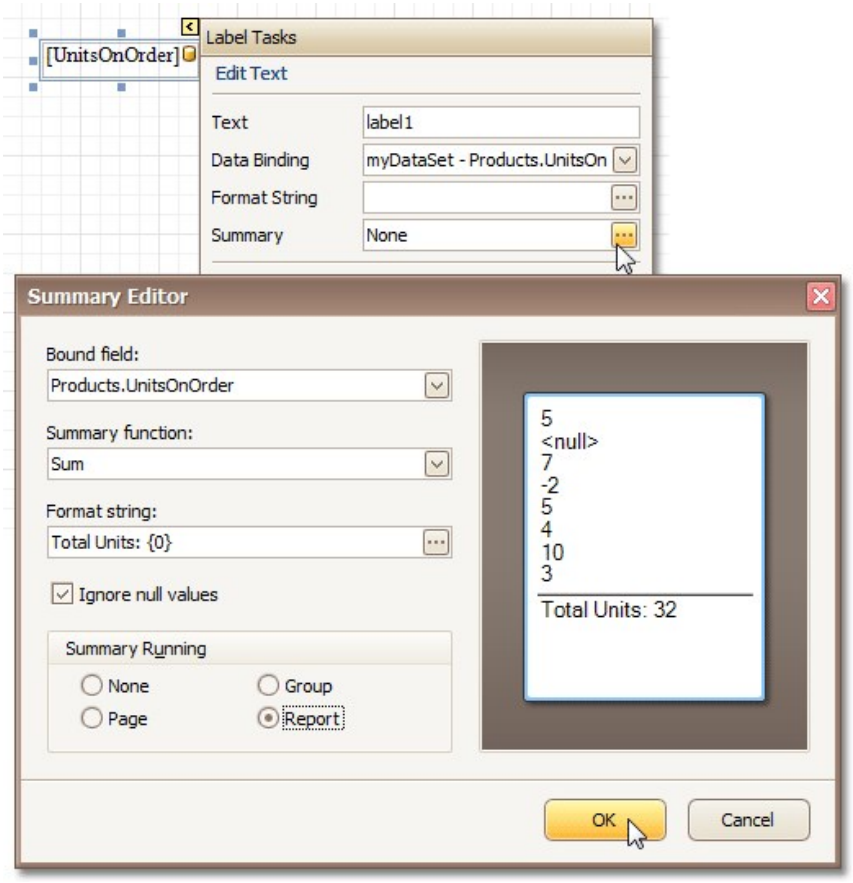
2.Click the field for which a summary will be calculated, to select it. Then, hold down CTRL and drag the
field onto the Report Footer area, to create an exact copy of the Label that will display the

summary.



Note
You can also create a new label for your total by simply dragging it from the Control Toolbox.

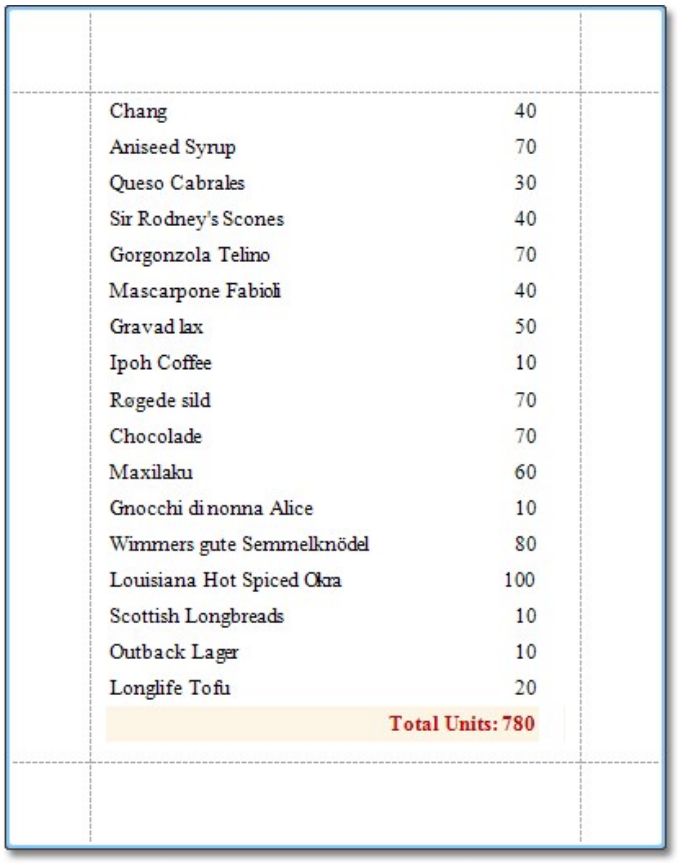
3.Now, select the newly created Label, click its Smart Tag, and in its actions list, click the ellipsis button for
the **Summary** item. And, in the invoked **Summary Editor**, specify the summary options. The following image shows an example of how you can set up your total. Note that the **Summary**
Running option is set to **Report**, to ensure that all values from the specified data field are taken into
account.



The **Ignore NULL values** option won't affect the result in this example, since NULL values are treated like zeros, by
default. So, Sum won't change whether these values are taken into account or not. This option makes sense for
functions like **Count** or **Average**, because the number of elements counted will depend on

it.
Note also that value formatting is applied to a summary independently of the general formatting, and
has a greater priority.

When calculating totals for groups, you can sort the groups against a summary function result.
To save the settings and close the dialog, click OK.
Switch to the Preview Tab, and view the result.



Chang	40
Aniseed Syrup	70
Queso Cabrales	30
Sir Rodney's Scones	40
Gorgonzola Telino	70
Mascarpone Fabioli	40
Gravad lax	50
Ipoh Coffee	10
Røgede sild	70
Chocolade	70
Maxilaku	60
Gnocchi di nonna Alice	10
Wimmers gute Semmelknödel	80
Louisiana Hot Spiced Okra	100
Scottish Longbreads	10
Outback Lager	10
Longlife Tofu	20
Total Units: 780	

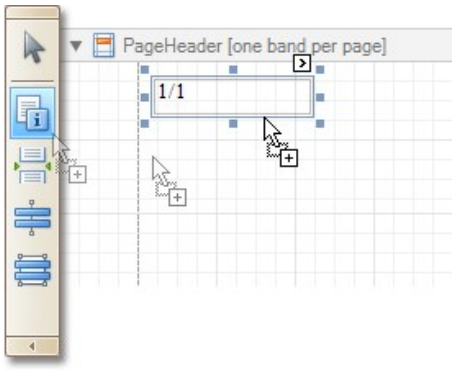
See also
Report Bakup
Change Elements in your Report
Change Fonts and Colors of Report Elements
Delete Reports
Add or Modify Static Information in Your Report
Use Mail Merge in Report Elements
Add Calculated Fields to a Report
Add Parameters to a Report
Change Value Formatting of Report Elements
Change or Apply Data Sorting to a Report
Change or Apply Data Filtering to a Report
Change or Apply Data Grouping to a Report

Add URLs to a report
Add Page Numbers and System Information to a Report
Create or Modify Watermarks of a Report

Add Page Numbers and System Information to a Report

This document describes how to insert page numbers or other system information (e.g. current date and time, us er
name, etc.) into a report.

Generally, this information is displayed within the Page Header and Footer or Page Margin bands. To add page
numbers or system information to a report, locate the Control Toolbox and drag and drop the Page Info control.

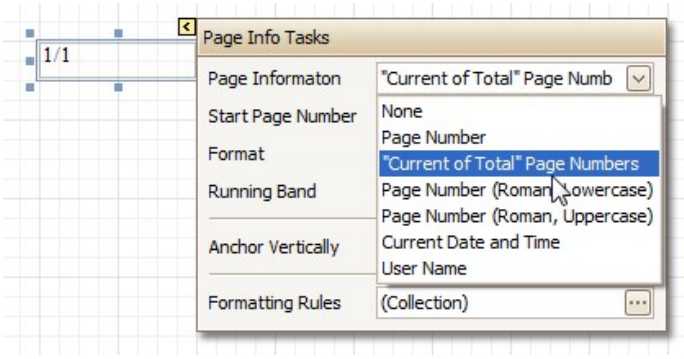


Then, follow the instructions below for your specific task:

- Add Page Numbers
- Add System Date and Time
- Add the User Name

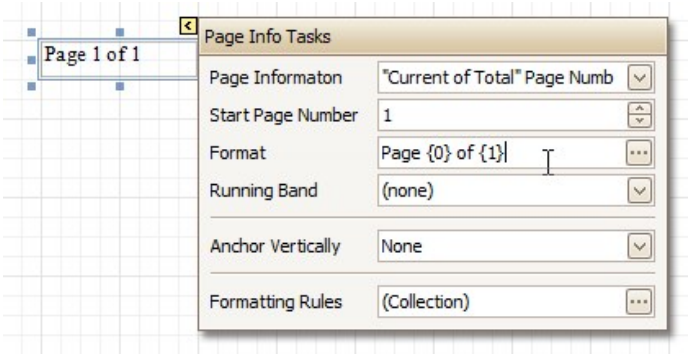
Add Page Numbers

1.Select the Page Info control, click its Smart Tag, and in the invoked actions list, expand the drop-down list for the **Page Information** entry.



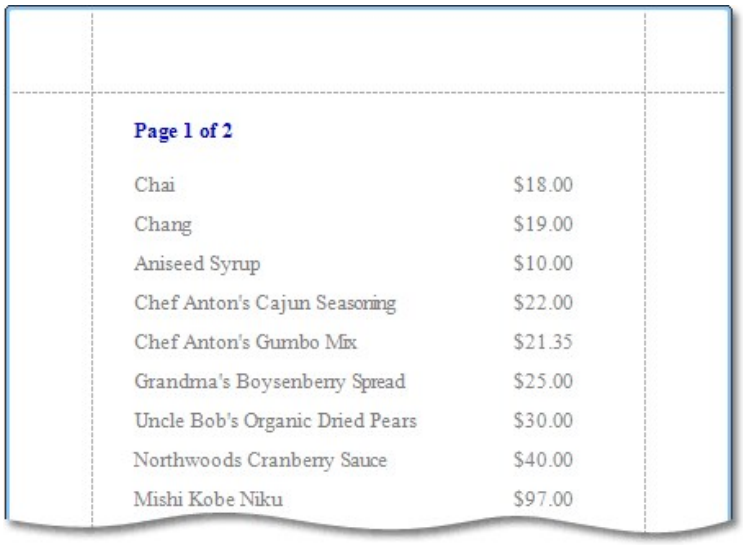
Select whether to display only the page number (Latin or Roman - uppercase or lowercase), or the current page number with total pages.

2.To format the control's text, via its Smart Tag, invoked its actions list, and specify the required format (e. g. Page {0} of {1}).



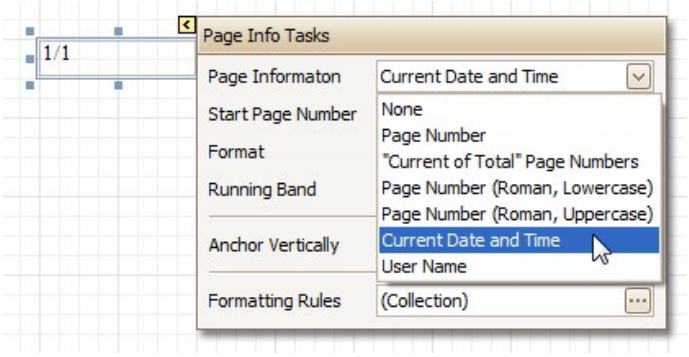
3.Using the control's actions list, you also can specify the s tarting page number, and the running band (e.g.
this option is available when there are groups in a report, and it's required to apply independent page
numbering for them). For details on this, refer to Add Page Numbers for Groups.

The result is shown below:

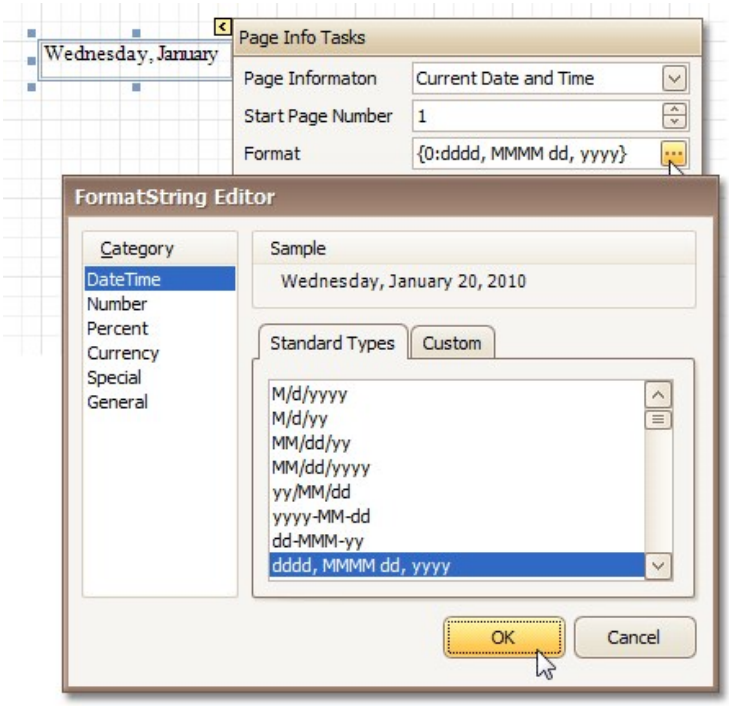


Add System Date and Time

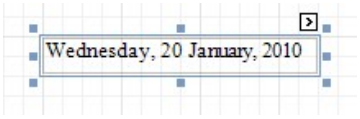
1.Select the **Page Info** control, click its Smart Tag, and in the invoked actions list, expand the drop-down
list for the **Page Information** entry, and select **Current Date and Time**.



2.To format the control's text, via its Smart Tag, invoked its actions list, and specify the required format.
You can either type it in the **Format** field, or, click its ellipsis button and use the **Format String Editor**.

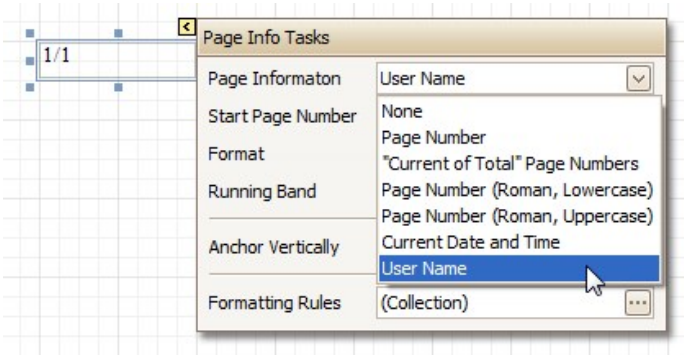


The result is shown below:

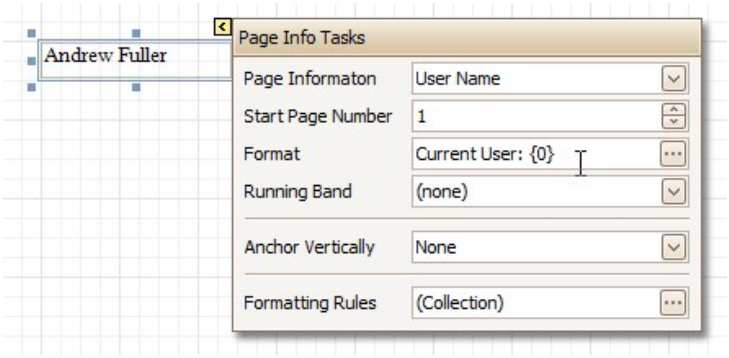


Add the User Name

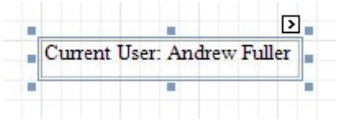
1.Select the **Page Info control**, click its Smart Tag, and in the invoked actions list, expand the drop-down list for the **Page Information** entry, and select **User Name**.



2.To format the control's text, via its Smart Tag, invoke its actions list, and specify the required format (e.g. Current User: {0}).



The result is shown below:



See also
Report Bakup
Change Elements in your Report
Change Fonts and Colors of Report Elements
Delete Reports
Add or Modify Static Information in Your Report
Use Mail Merge in Report Elements
Add Calculated Fields to a Report
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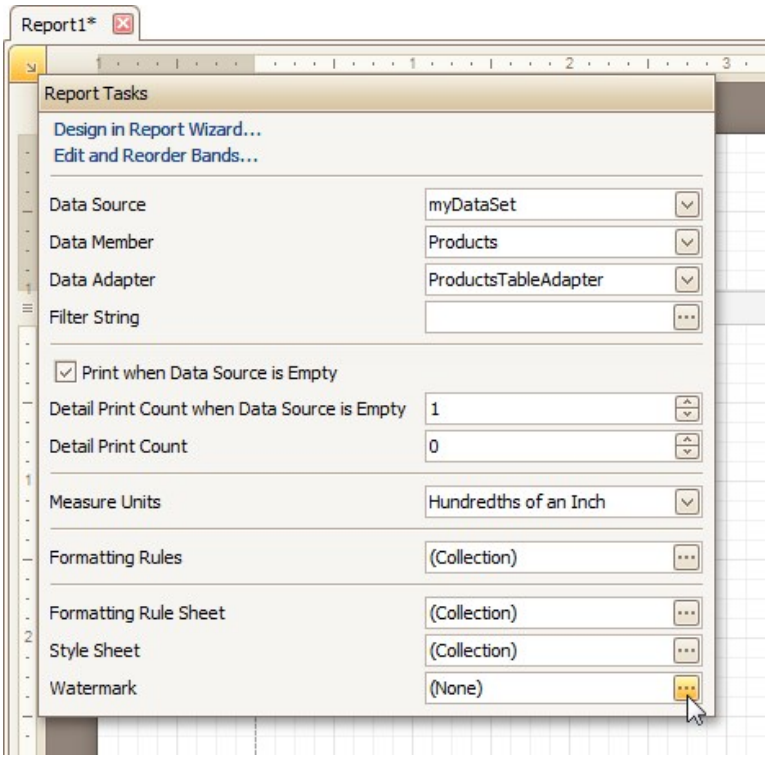
Add URLs to a report
Add Totals to a Report
Create or Modify Watermarks of a Report

Create or Modify Watermarks of a Report

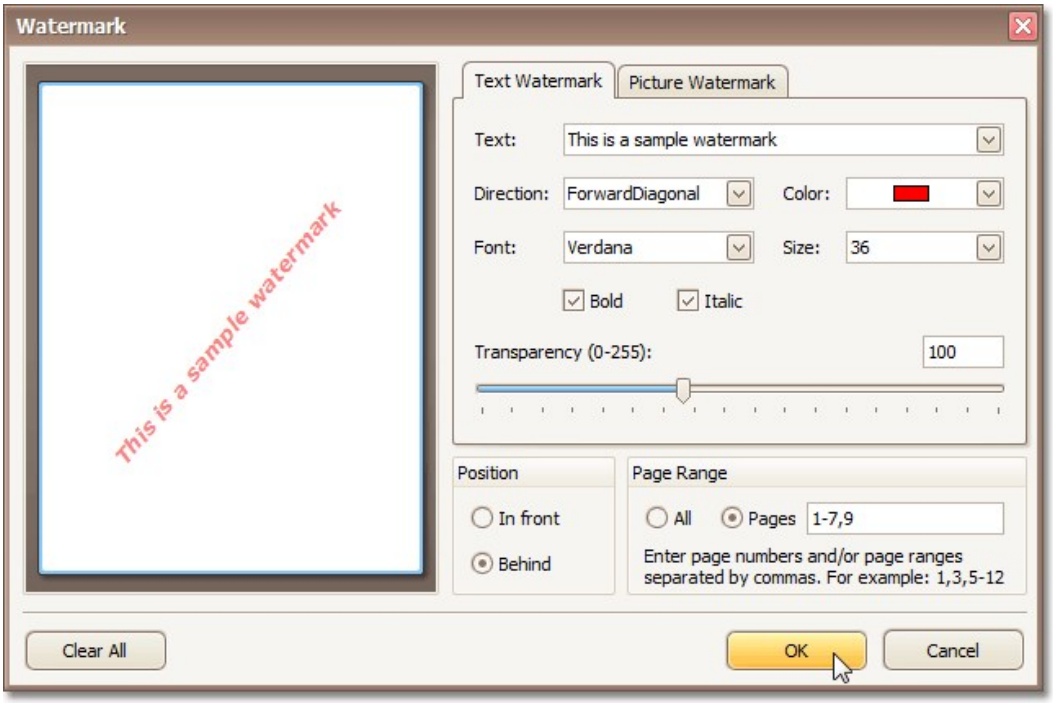
This document describes how to add a text watermark in a report, or turn a picture into a report's background.

Note that watermarks are visible only in Preview and HTML View modes.
To create a new watermark in a report (or to modify the existing one), do the following:

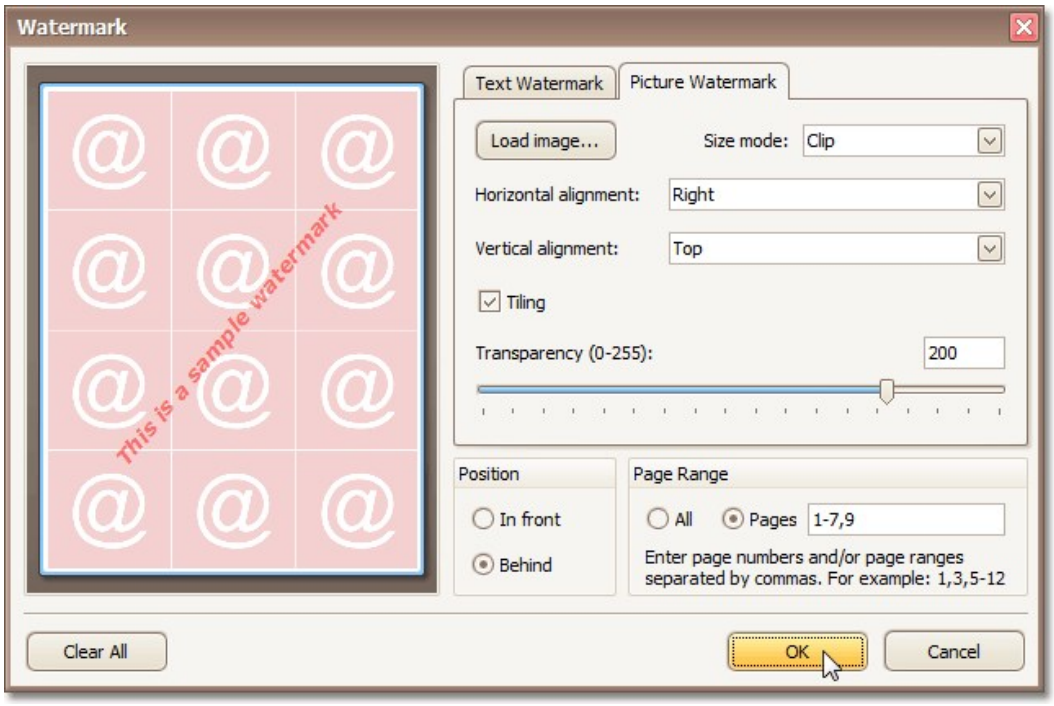
1.Click the report's Smart Tag, and in its actions list, click the ellipsis button for the **Watermark** entry.



2.In the **Text** tab of the invoked **Watermark dialog**, define the required properties for the text watermark.



3.Then, switch to the **Picture Watermark** tab, to load the image to be used as a watermark, and define
its properties, such as Size mode, Alignment (vertical and horizontal), Tiling, Transparency, Page Range,
etc.



As you can see, it is possible to use both textual and image watermarks simultaneously. The report with watermark is now ready. Switch to the **Preview Tab**, and view the result:

See also

Report Bakup
Change Elements in your Report
Change Fonts and Colors of Report Elements
Delete Reports
Add or Modify Static Information in Your Report
Use Mail Merge in Report Elements
Add Calculated Fields to a Report
Add Parameters to a Report
Change Value Formatting of Report Elements
Change or Apply Data Sorting to a Report
Change or Apply Data Filtering to a Report
Change or Apply Data Grouping to a Report

Add URLs to a report
Add Totals to a Report
Add Page Numbers and System Information to a Report

Create Reports

With the help of the Report Designer, you can edit existing reports, as well as create your own reports from scratch. The following sections contain tutorials providing step-by-step instructions on both basic and advanced report customization.

- Basic Operations
  The topics in this section cover the basics of working with reports in the Report Designer.
- Report Types
  The tutorials in this section provide you detailed instructions on how to create reports of different types with the Report Designer.
- Styles and Conditional Formatting in Reports
  The topics of this section cover appearance-related information about the Report Designer.
- Report Navigation
  The tutorials of this section cover the navigation-related features of the Report Designer.
- Miscellaneous Report Management Capabilities
  The topics of this section cover the Report Designer features that don't fall into other categories.

See also
Welcome
Outreach Installation
Email Marketing with Outreach|IT
Licensing
RDP License
System Requirements
About Outreach|IT
Quick Start
How to Use OUTREACH|IT
Outreach Settings
Creating Reports
How to create email template
How to create Outreach Schemas
Report Designer
Report Editing Basics
Report Designer Reference
Preview and Print Reports
Support

Basic Operations

The topics in this section cover the basics of working with reports in the Report Designer. This section consists of the following topics:

- Create a New Report

- Controls Positioning
- Change Measurement Units for a Report
- Change Page Settings for a Report

See also

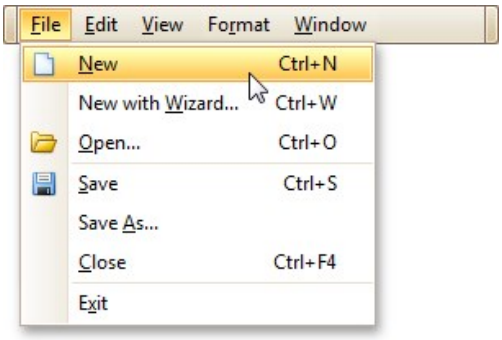
Create a New Report

This topic explains how to create a new blank report in the Report Designer. Before you start, make sure to back up the current report.

To create a new report, do one of the following:

Create a New Blank Report

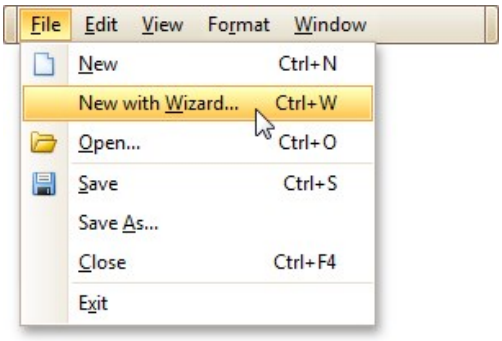
In the Main Menu, click **File** and then **New** (or press CTRL+N).



The Main Toolbar contains a button ( ) with the same function.
If there is another report already loaded in the designer, you may be prompted whether it should be saved before it is replaced with a newly created report. By default, the created report contains three bands - Page Header and Footer, and the Detail band.

Create a New Report Using the Report Wizard

In the Main Menu, click **File** and then **New with Wizard**... (or press CTRL+W).



See also

Controls Positioning

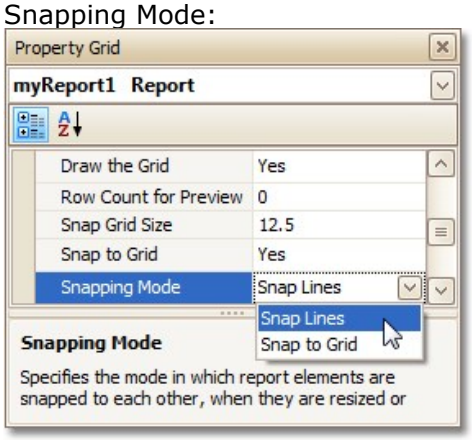
Change Measurement Units for a Report
Change Page Settings for a Report

Controls Positioning

This document describes how to easily construct professional looking reports, by precisely aligning their elements to each other. For this, the two following facilities are introduced in the Report Designer:

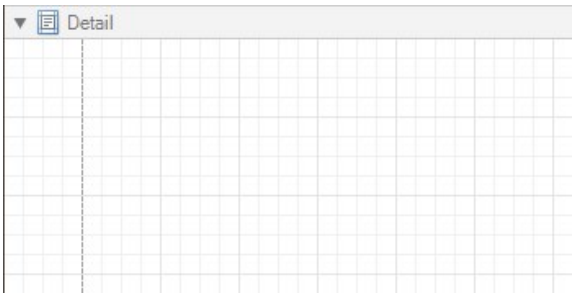
- Snap Grid
- Snap Lines

You can choose which mode to use for controls alignment within your report, by setting its Snapping Mode:

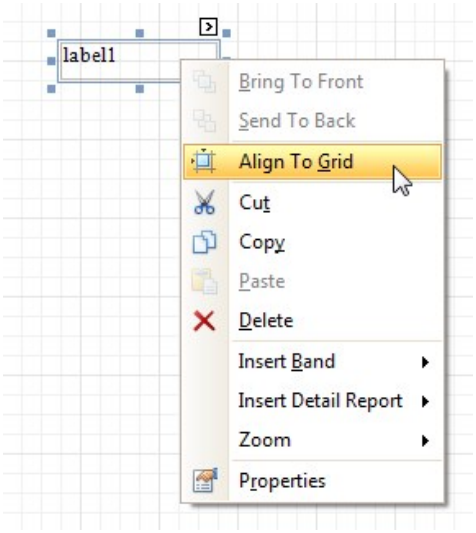


Snap Grid

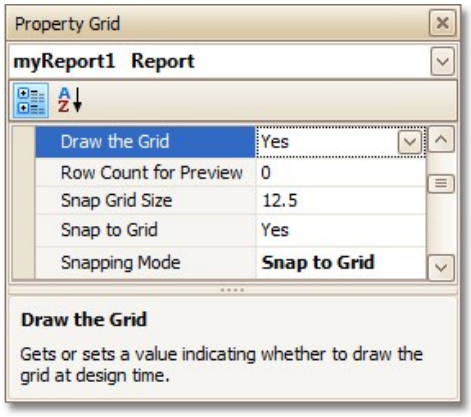
When a report is being designed in the Design Panel, it is lined up by the **Snap Grid**. This helps to establish the distance between report elements, and to precisely align them to each other.



To quickly align a control to the report's Snap Grid, right click the control, and in the invoked Context Menu, click **Align To Grid.**



You can choose whether the Snap Grid should be visible, by selecting your report, and setting the **Draw the Grid** option in the Property Grid.



You also can adjust the Snap Grid Size, which is measured in the measurement units set for your report.

The **Snap to Grid** option specifies whether controls are snapped to the Grid when they are moved as usual (with
no additional keys being hold down). When the Snap to Grid option is enabled, the default move behavior works
in the following way.

- For controls to be aligned to the Snap Grid while being moved:

- Using the keyboard: move them using the ARROW keys.
- Using the mouse: move them as usual.

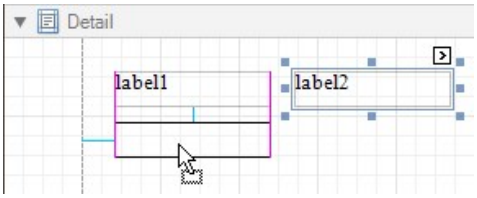
- For controls to ignore the Snap Grid while being moved:

- Using the keyboard: move them using ARROW keys while hold down CTRL.
- Using the mouse: move them while hold down ALT.

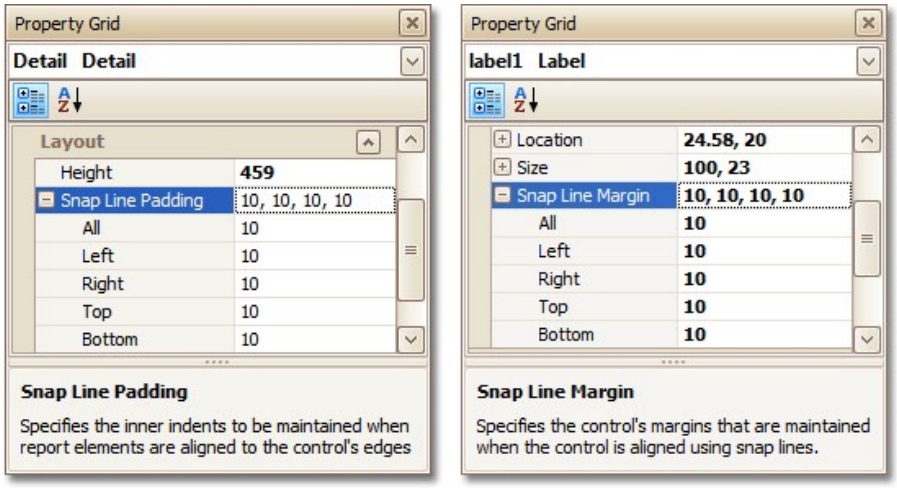
Disabling the **Snap to Grid** option swaps the default manipulation to its opposite (you should press CTRL or ALT,
to enable the Grid snapping).

Snap Lines

Instead of the Snap Grid for control positioning and alignment, you can utilize the **Snap Lines**. These are guide lines appearing when a control is being moved, and indicating the distance to other report elements (bands and
controls).



For each report element, you can modify its default Snap Line spacing (paddings for bands and Panel, and margins
for other controls) using the Property Grid.

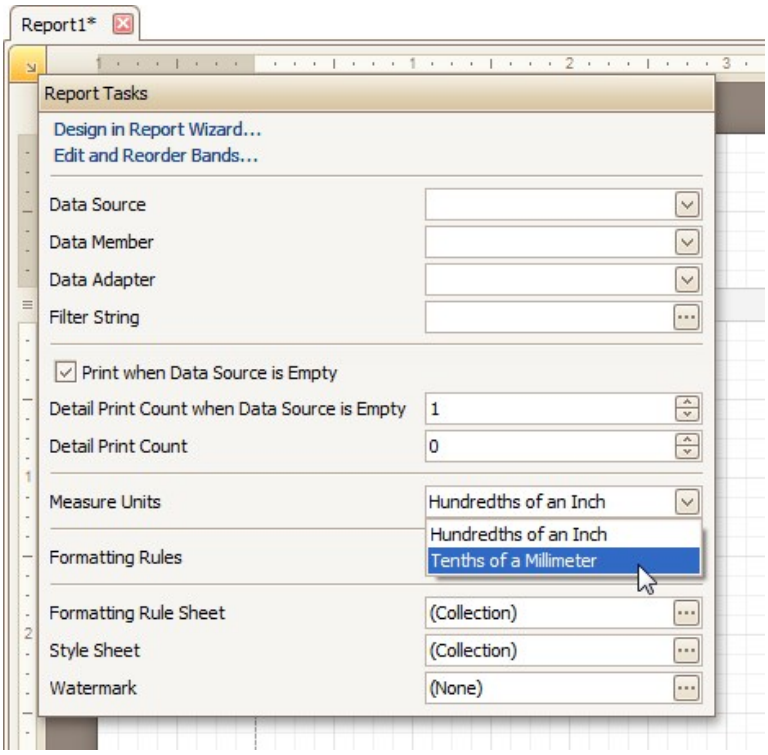


See also
Create a New Report
Change Measurement Units for a Report
Change Page Settings for a Report

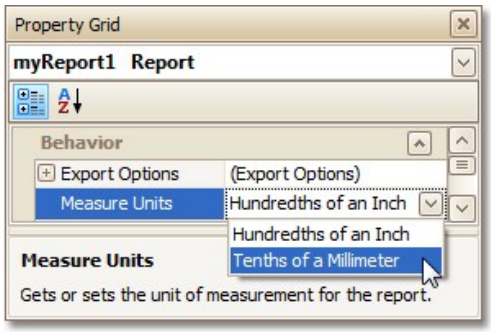
Change Measurement Units for a Report

For your report, you can choose its global **Measure Units**, which can be either **Hundredths of an Inch**, or **Tenths
of a Millimeter**.

This can be specified either using the report's Smart Tag ...



... or via the Property Grid.



This defines the basic measurement unit for all the unit-related options of a report and its bands and controls
(such as location, s ize, border width, etc.). And, this determines the measurement unit of the report's Snap Grid.

See also

Create a New Report
Controls Positioning
Change Page Settings for a Report

Home > Create Reports > Basic Operations > Change Page Settings for a Report

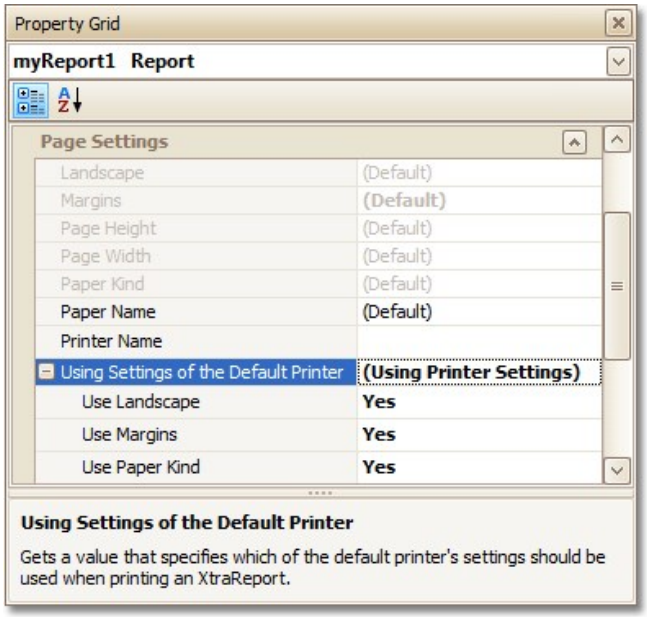
Change Page Settings for a Report

In the Report Designer, page settings of a report can be specified in one of two ways. The

first approach forces
the default printer settings to be used when the report is printed, while the other one enables you to alter page
settings independently.

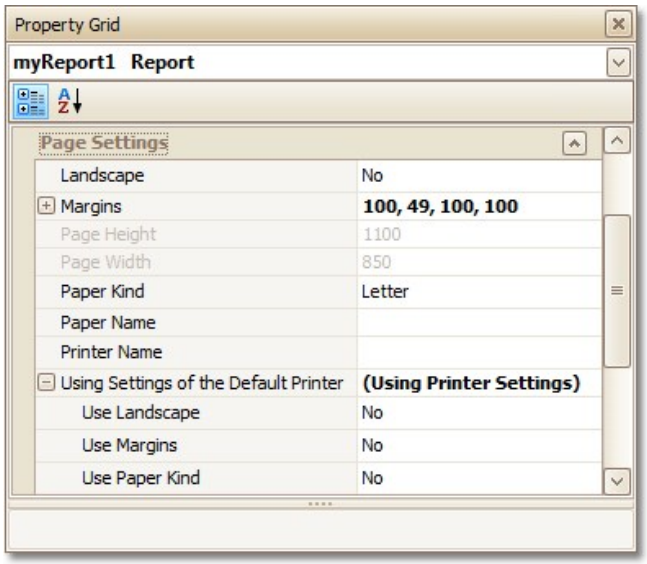
- **Using settings of the default printer**

For the orientation, margins and paper size, you can specify a requirement that applies the corresponding printer settings instead of the report's. In this instance, the page properties in the Property Grid are disabled and displayed as grayed out. This may be useful when the report is printed in several places with different printers and printer settings.


Property Grid
myReport1 Report
Page Settings
Landscape (Default)
Margins (Default)
Page Height (Default)
Page Width (Default)
Paper Kind (Default)
Paper Name (Default)
Printer Name
Using Settings of the Default Printer (Using Printer Settings)
Use Landscape Yes
Use Margins Yes
Use Paper Kind Yes
Using Settings of the Default Printer
Gets a value that specifies which of the default printer's settings should be used when printing an XtraReport.

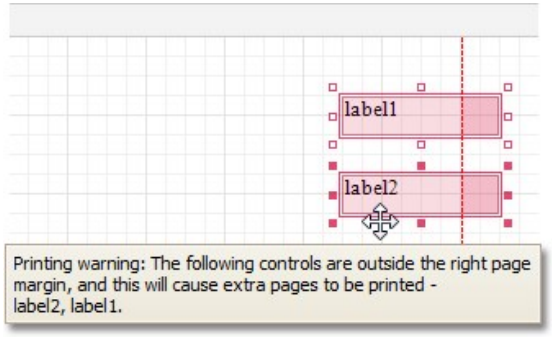
- **Specify the report's page settings**

While designing the report, you can specify the page settings via the Property Grid:



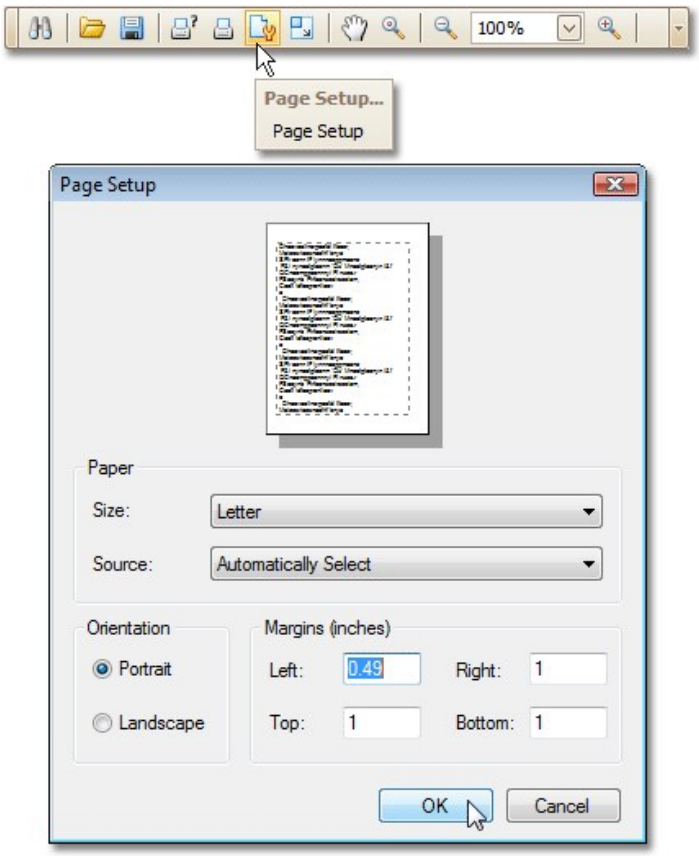
You can set the page orientation and modify the margins. The margin values are expressed in the report's measurement units. You can select from the predefined paper sizes (**Paper**

Kind property), choose **Custom** and create your own paper size, or select one which is already defined for this printer (**Paper Name** property).
These settings affect the layout of the report's design surface. After their modification, you may notice red
warning marks, indicating that the controls go beyond the page width. These warnings can be switched
off by setting the **Show Printing Warnings** property of the report to **No**.


label1
label2
Printing warning: The following controls are outside the right page margin, and this will cause extra pages to be printed - label2, label1.

- **Modify the settings in Preview Tab**

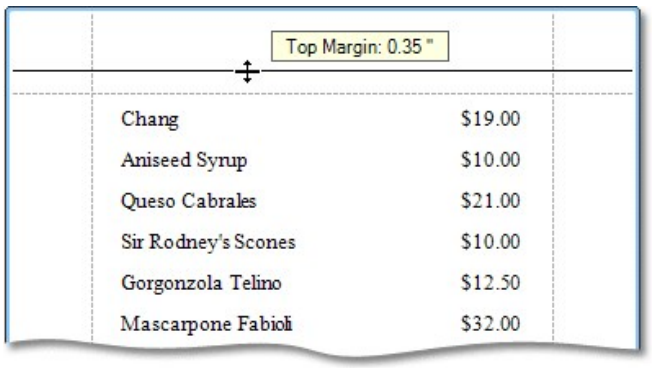
The report's Preview Tab toolbar has a corresponding button that enables you to modify the page
settings. Clicking this button invokes the **Page Setup** dialog, which allows you to adjust the page layout
before printing or exporting, and select the printer.



The margins can also be set visually by dragging the dashed lines in the Preview Tab as

needed.
To change the measurement units shown in the margins tooltips, customize the report's **Measure Units** property.

Measure Units = Hundredths of an Inch



Measure Units = Tenths of a Millimeter

See also
Create a New Report
Controls Positioning
Change Measurement Units for a Report

Report Designer Reference

A report is built from **controls** (text labels, images, zip codes, charts, etc) spread across report sections called **bands** (various headers, footers and content sections). The main interface elements helping you manage these building blocks are **Control Toolbox**, **Field List** and **Property Grid**. These elements allow you add controls to your report, bind them to data and change their appearance and behavior settings, respectively.

To learn more about these and other elements used in the Report Designer, use the following links.

- Report Designer UI

The documents in this section are dedicated to the elements of the Report Designer user interface.

- Report Controls

The documents in this section describe options of each report control available in the Report Designer.

- Report Bands

The documents in this section details the available kinds of report bands and their settings.

- Report Settings

This document details settings that affect the entire report.

See also
Welcome
Outreach Installation
Email Marketing with Outreach|IT
Licensing
RDP License
System Requirements
About Outreach|IT
Quick Start
How to Use OUTREACH|IT
Outreach Settings
Creating Reports
How to create email template
How to create Outreach Schemas
Report Designer
Report Editing Basics
Create Reports
Preview and Print Reports
Support

Report Designer UI

The documents in this section are dedicated to the elements of the Report Designer user interface.

The Report Designer interface is comprised of the following elements.

General Elements

- Control Toolbox
- Design Panel
- Main Menu

Quick Access Tools

- Context Menu
- Smart Tag

Toolbars

- Main Toolbar
- Formatting Toolbar
- Layout Toolbar
- Zoom Toolbar

Dock Panels

- Field List
- Group and Sort Panel
- Property Grid
- Report Explorer
- Scripts Errors Panel

Tabs

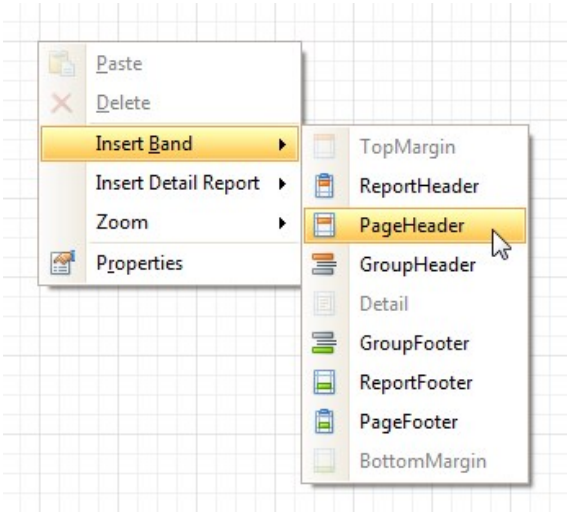
- Designer Tab
- Preview Tab
- HTML View Tab
- Scripts Tab

See also

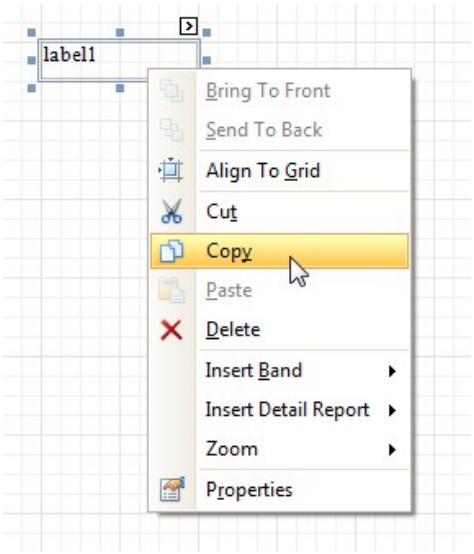
Report Controls

Context Menu

The **Context Menu** can be invoked by the right-clicking a report...



or its elements (bands and controls). This menu provides quick access to frequently used commands (e.g.
zooming, clipboard operations, inserting bands, etc.) The available action set varies, depending on the element



See also

Control Toolbox
Design Panel
Designer Tab
Field List
Formatting Toolbar
Group and Sort Panel
HTML View Tab
Layout Toolbar
Main Menu
Main Toolbar
Preview Tab

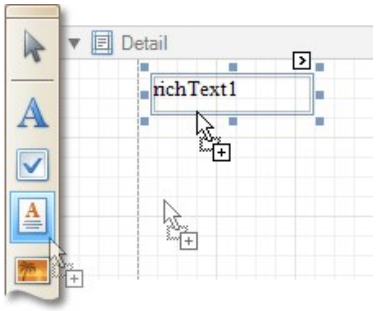
Property Grid
Report Explorer
Scripts Errors Panel
Scripts Tab
Smart Tag
Status Bar
Zoom Toolbar

Control Toolbox

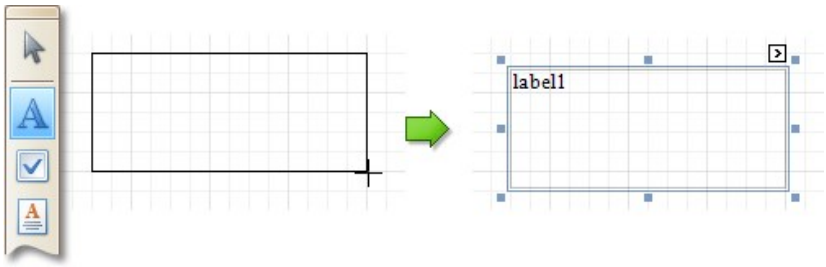
The Control Toolbox lists all available controls and allows you to add them to your report.

To add a control from the Toolbox, do one of the following.

- Double-click an item in the Toolbox for the appropriate control, which will be created at the Detail band's top left corner.
- Drag and drop an item from the Toolbox onto the required location within a report.



- Select an item in the Toolbox, and then click the required location within a report.
- Select an item in the Toolbox, and then indicate the bounding rectangle by holding the left mouse button.



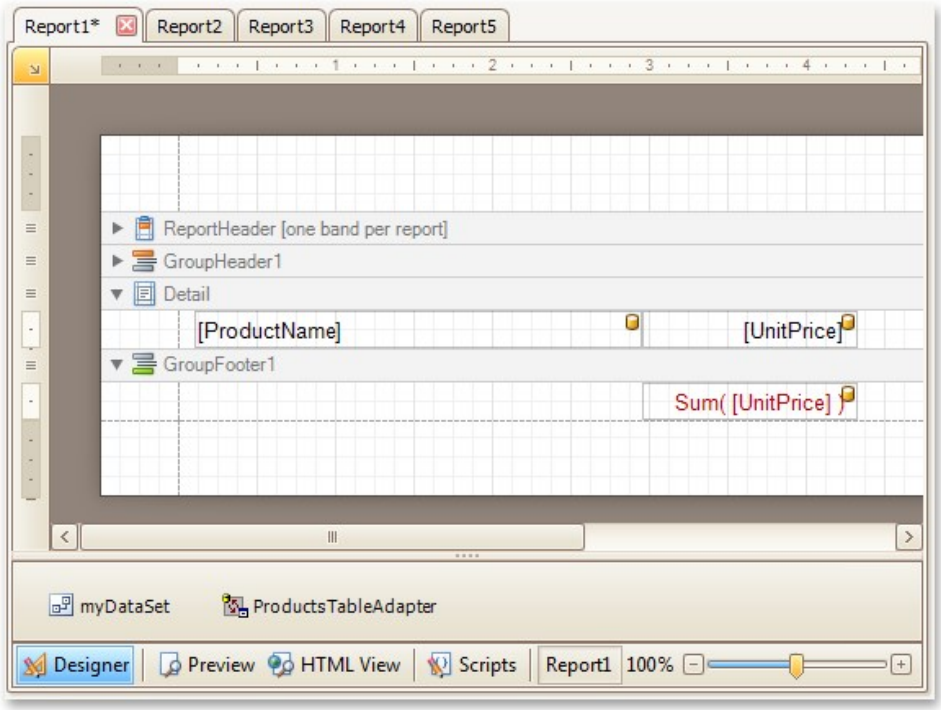
Select the Pointer item when you need to perform selection, re-positioning or resizing operations. It is automatically selected after you drop a control onto a report.
If the Toolbox is hidden, you can enable it in the Main Menu, by selecting View / Toolbars / Toolbox.

See also

Context Menu
Design Panel
Designer Tab
Field List
Formatting Toolbar
Group and Sort Panel
HTML View Tab
Layout Toolbar
Main Menu
Main Toolbar
Preview Tab
Property Grid
Report Explorer
Scripts Errors Panel
Scripts Tab
Smart Tag
Status Bar
Zoom Toolbar

Design Panel

The **Design Panel** is the Report Designer's main area, where a report is being constructed and previewed.



On the Designer Tab, multiple reports can be opened at once (each in its own Design Panel). The Design Panel provides the following tabs (switched at the bottom):

- Designer Tab

Allows you to modify your report.

- Preview Tab

Shows a print preview, and enables you to print out your report or export it to a file on disk.

- HTML View Tab

Shows the report output in HTML format.

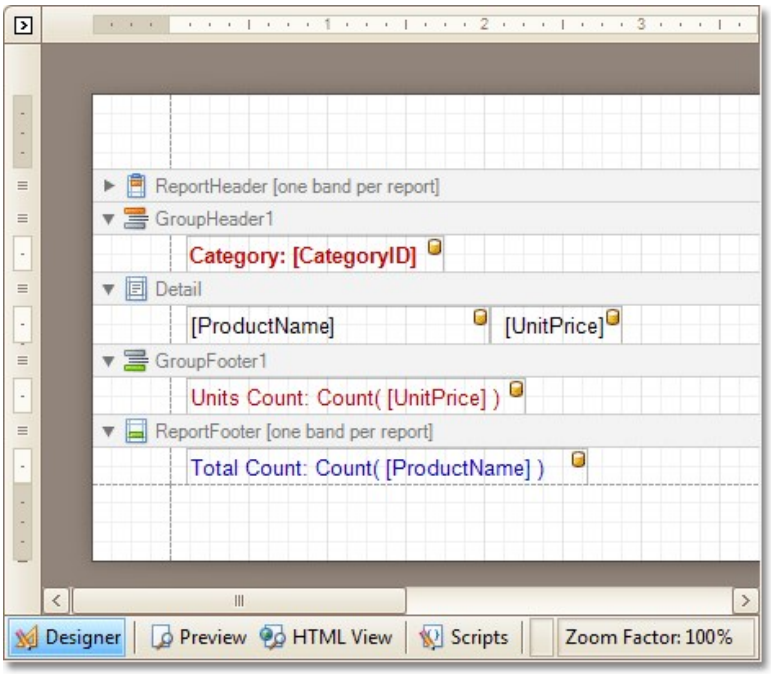
- Scripts Tab

Allows you to manage your report's scripts.

See also
Context Menu
Control Toolbox
Designer Tab
Field List
Formatting Toolbar
Group and Sort Panel
HTML View Tab
Layout Toolbar
Main Menu
Main Toolbar
Preview Tab
Property Grid
Report Explorer
Scripts Errors Panel
Scripts Tab
Smart Tag
Status Bar
Zoom Toolbar

Designer Tab

The **Designer Tab** allows you to customize a report, manage its bands and controls and define their properties.



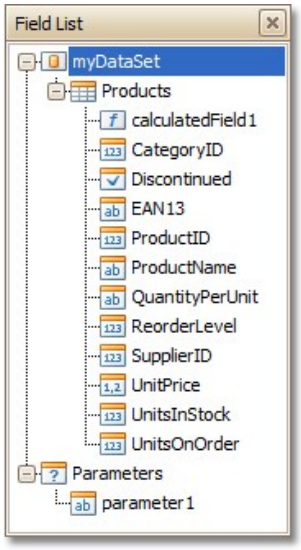
See also

Context Menu
Control Toolbox
Design Panel
Field List
Formatting Toolbar
Group and Sort Panel
HTML View Tab
Layout Toolbar
Main Menu
Main Toolbar
Preview Tab
Property Grid
Report Explorer
Scripts Errors Panel
Scripts Tab
Smart Tag
Status Bar
Zoom Toolbar

Field List

The Field List window serves the following purposes.

- Displays the list of all available data fields (attributes you can show in your report) and allows you to create report elements that will show information from these fields.
- Allows you to create calculated fields by building expressions based on the values of data fields, report parameter values, etc.
- Shows existing report parameters, and allows you to add parameters to your report.



If the Field List is hidden, you can enable it in the Main Menu, by selecting **View | Windows | Field List**.

See also

Context Menu
Control Toolbox
Design Panel
Designer Tab
Formatting Toolbar
Group and Sort Panel

HTML View Tab
Layout Toolbar
Main Menu
Main Toolbar
Preview Tab
Property Grid
Report Explorer
Scripts Errors Panel
Scripts Tab
Smart Tag
Status Bar
Zoom Toolbar

Formatting Toolbar

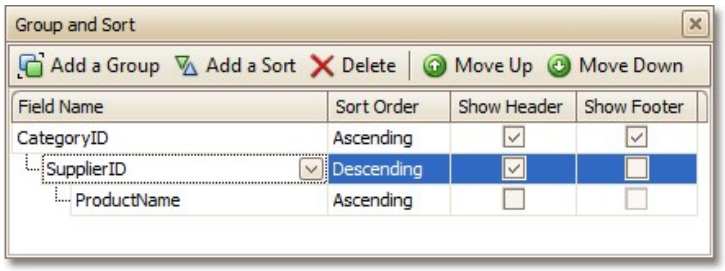
The Formatting Toolbar allows you to easily customize an element's font, color and alignment settings.

If the Formatting Toolbar is hidden, you can enable it in the Main Menu, by selecting View / Toolbars / Formatting
Toolbar.

See also
Context Menu
Control Toolbox
Design Panel
Designer Tab
Field List
Group and Sort Panel
HTML View Tab
Layout Toolbar
Main Menu
Main Toolbar
Preview Tab
Property Grid
Report Explorer
Scripts Errors Panel
Scripts Tab
Smart Tag
Status Bar
Zoom Toolbar

Group and Sort Panel

The **Group and Sort Panel** allows you to quickly apply grouping and sorting to your report data.



To create a new grouping or sorting criterion, simply click **Add a Group** or **Add a Sort**.
Then, to control whether the corresponding **Group Header** or **Footer band** should be seen, use the **Show Header** and **Show Footer** check boxes.
An ascending or descending grouping (sorting) mode is specified via the Sort Order drop-down list.
You can change the order in which multiple grouping and sorting criteria are to be performed, via the **Move Up**
and **Move Down** buttons.
To remove a grouping or sorting criterion, select it, and click **Delete**.

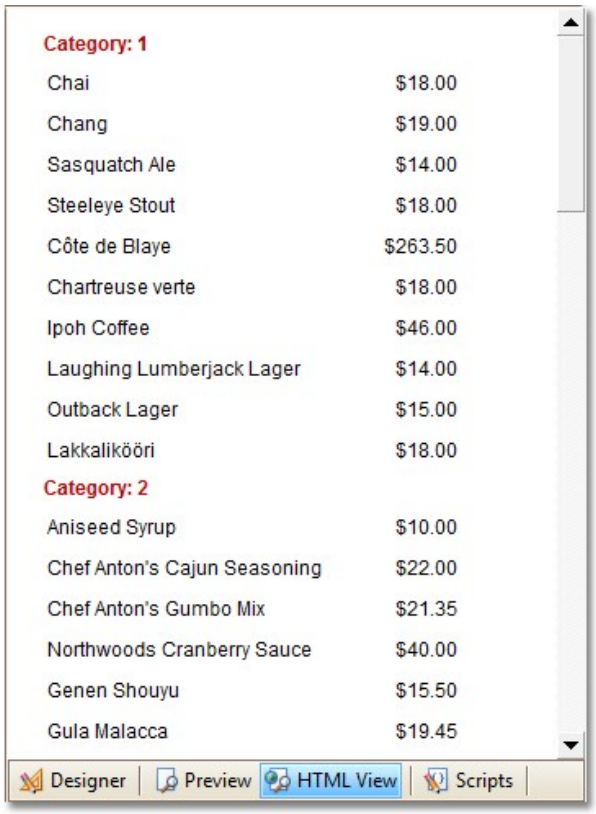
Note
If the Group and Sort Panel is hidden, you can enable it in the Main Menu, by selecting **View | Windows | Group and Sort.**

See also
Context Menu
Control Toolbox
Design Panel
Designer Tab
Field List
Formatting Toolbar
HTML View Tab
Layout Toolbar
Main Menu
Main Toolbar
Preview Tab
Property Grid
Report Explorer
Scripts Errors Panel
Scripts Tab
Smart Tag
Status Bar
Zoom Toolbar

Home > Report Designer Reference > Report Designer UI > HTML View Tab

HTML View Tab

The **HTML View** Tab allows you to preview the HTML output of a report.



See also

Context Menu
Control Toolbox
Design Panel
Designer Tab
Field List
Formatting Toolbar
Group and Sort Panel
Layout Toolbar
Main Menu
Main Toolbar
Preview Tab
Property Grid
Report Explorer
Scripts Errors Panel
Scripts Tab
Smart Tag
Status Bar
Zoom Toolbar

Layout Toolbar

The **Layout Toolbar** allows you to easily align report elements to one another, change their size to match one another and customize spacing and z-order.

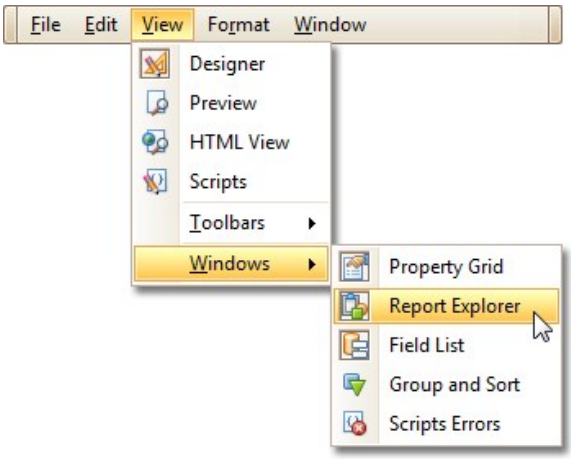
If the Layout Toolbar is hidden, you can enable it in the Main Menu, by selecting View | Toolbars | Layout Toolbar

See also

Context Menu
Control Toolbox
Design Panel
Designer Tab
Field List
Formatting Toolbar
Group and Sort Panel
HTML View Tab
Main Menu
Main Toolbar
Preview Tab
Property Grid
Report Explorer
Scripts Errors Panel
Scripts Tab
Smart Tag
Status Bar
Zoom Toolbar

Main Menu

The **Main Menu** contains various commands grouped in four sub-menus. These menu items duplicate various commands available in the Report Designer's Toolbars, and allow you to switch between different Tabs, and hide or show the available Toolbars and Panels.



To switch focus on the Main Menu, press ALT.

See also
Context Menu
Control Toolbox
Design Panel
Designer Tab
Field List
Formatting Toolbar
Group and Sort Panel
HTML View Tab
Layout Toolbar
Main Toolbar
Preview Tab
Property Grid
Report Explorer
Scripts Errors Panel
Scripts Tab
Smart Tag
Status Bar
Zoom Toolbar

Main Toolbar

The **Main Toolbar** contains buttons which provide the capability to create new reports, save and load report layouts, cut, copy and paste report elements, and undo-redo actions in the Report Designer.

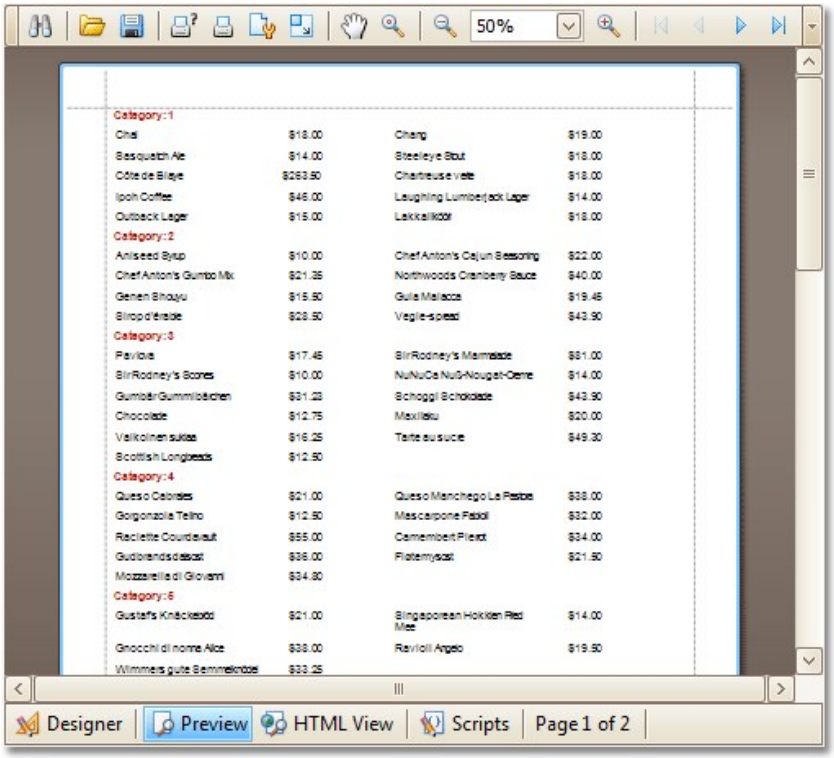
If the Main Toolbar is hidden, you can enable it in the Main Menu, by selecting **View | Toolbars | Main Toolbar**.

See also
Context Menu
Control Toolbox
Design Panel
Designer Tab
Field List
Formatting Toolbar
Group and Sort Panel
HTML View Tab
Layout Toolbar
Main Menu
Preview Tab
Property Grid
Report Explorer
Scripts Errors Panel

Scripts Tab
Smart Tag
Status Bar
Zoom Toolbar

Preview Tab

The **Preview Tab** is intended to check the print output of a report and customize its additional options.



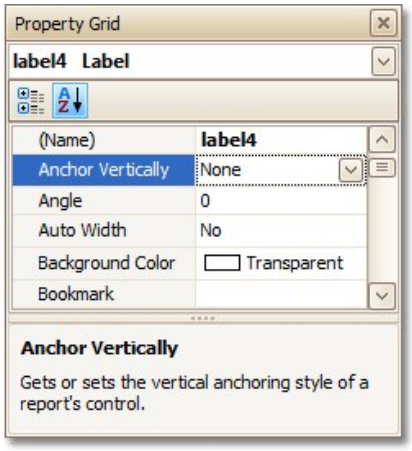
See also

Context Menu
Control Toolbox
Design Panel
Designer Tab
Field List
Formatting Toolbar
Group and Sort Panel
HTML View Tab
Layout Toolbar
Main Menu
Main Toolbar
Property Grid
Report Explorer
Scripts Errors Panel

Scripts Tab
Smart Tag
Status Bar
Zoom Toolbar

Property Grid

The **Property Grid** allows you to change the settings of the currently selected report element.



To select an element and show its properties within the Property Grid, do one of the following:

- Click the required element on the Report Designer surface.
- Select an element using the Report Explorer window.
- Select an element from the Property Grid's combo box.

To reset a property value, right-click this property, and in the invoked menu, click **Reset.**

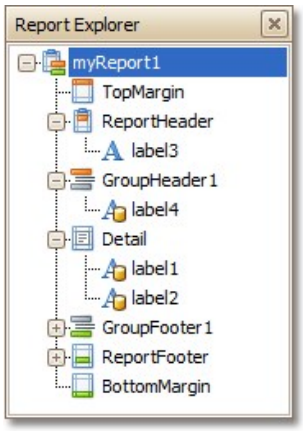
If the Property Grid is hidden, you can enable it in the Main Menu, by selecting **View | Windows | Property Grid**.

See also
Context Menu
Control Toolbox
Design Panel

Designer Tab
Field List
Formatting Toolbar
Group and Sort Panel
HTML View Tab
Layout Toolbar
Main Menu
Main Toolbar
Preview Tab
Report Explorer
Scripts Errors Panel
Scripts Tab
Smart Tag
Status Bar
Zoom Toolbar

Report Explorer

The **Report Explorer** shows a report's structure in a tree form, providing easy access to report elements. Once an element has been selected in the Report Explorer, it's settings can be changed using the Property Grid.



If the Report Explorer is hidden, you can enable it in the Main Menu, by selecting **View | Windows | Report Explorer.**

See also

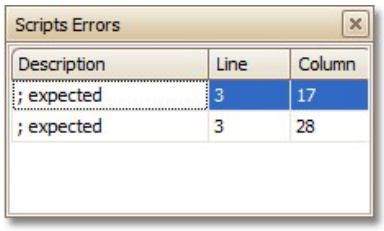
Context Menu
Control Toolbox
Design Panel
Designer Tab
Field List
Formatting Toolbar
Group and Sort Panel
HTML View Tab
Layout Toolbar

Main Menu
Main Toolbar
Preview Tab
Property Grid
Scripts Errors Panel
Scripts Tab
Smart Tag
Status Bar
Zoom Toolbar

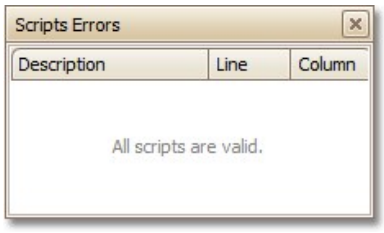
Scripts Errors Panel

The **Scripts Errors Panel** displays the result of scripts validation after it's forced in the Scripts Tab.

Then, if errors are located, they are listed in this panel. To get to the corresponding line of code, click the corresponding item in the panel's list.



Or, if all scripts are valid, the panel reports this.

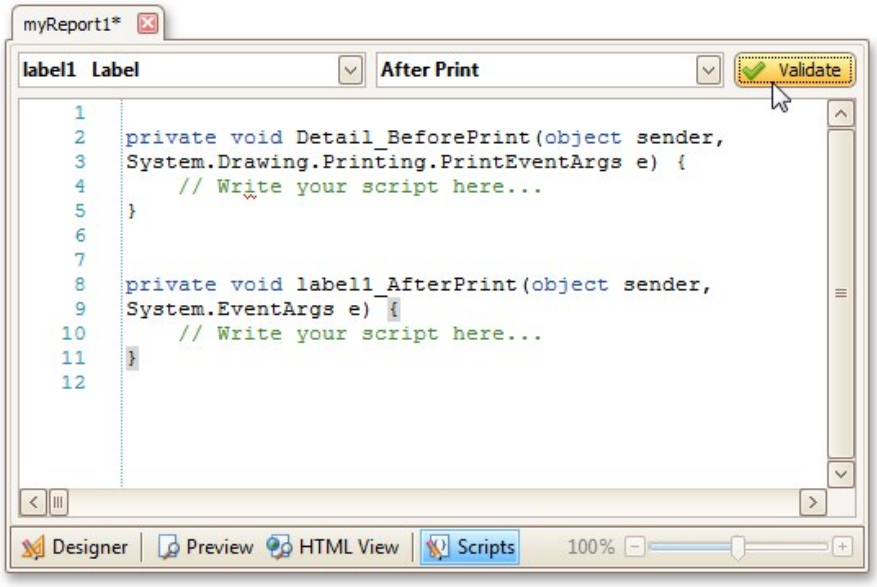


See also
Context Menu
Control Toolbox
Design Panel
Designer Tab
Field List
Formatting Toolbar
Group and Sort Panel
HTML View Tab
Layout Toolbar
Main Menu
Main Toolbar
Preview Tab
Property Grid

Report Explorer
Scripts Tab
Smart Tag
Status Bar
Zoom Toolbar

Scripts Tab

The **Scripts Tab** allows you to manage your report's scripts. It provides centralized access to all the scripts being written for a report or any of its elements (bands and controls).



The built-in scripts validation capability is provided in this tab. After clicking Validate, the result is displayed in the **Scripts Errors Panel**.

See also

Context Menu
Control Toolbox
Design Panel
Designer Tab
Field List
Formatting Toolbar
Group and Sort Panel
HTML View Tab
Layout Toolbar
Main Menu
Main Toolbar
Preview Tab
Property Grid
Report Explorer
Scripts Errors Panel

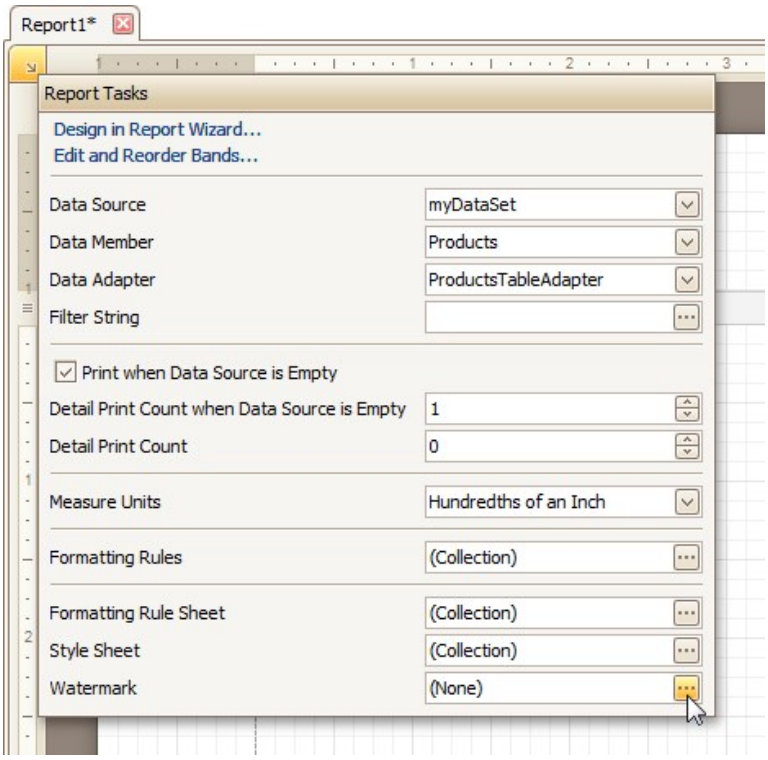
Smart Tag
Status Bar
Zoom Toolbar

Smart Tag

Most report elements have **Smart Tags** that provide easy access to the most frequently used settings. Clicking an element's Smart Tag invokes an actions list with action links and editors, allowing you to customize this element.

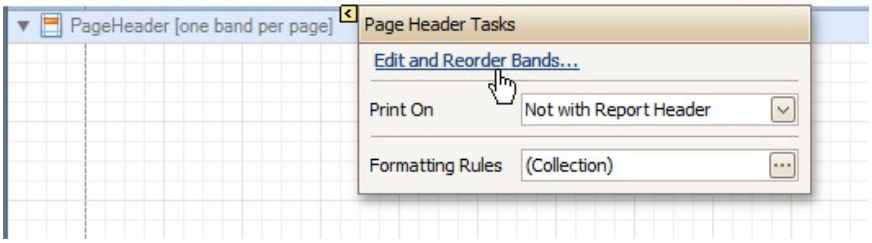
- Report Smart Tag

A report's Smart Tag icon is located at the top left corner of the Design Panel.



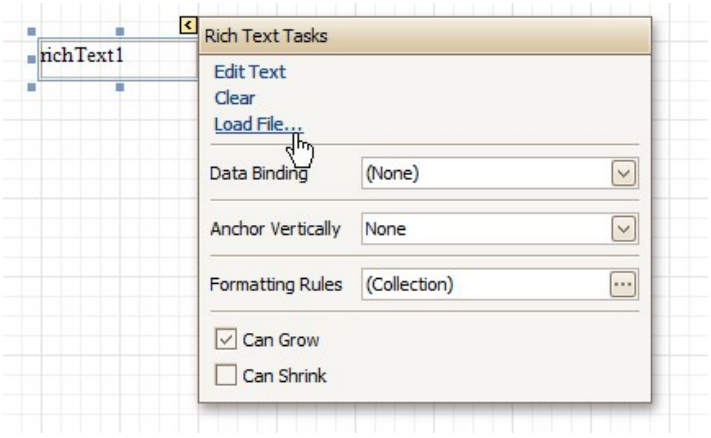
- Band Smart Tag

A band's Smart Tag icon is located on the band strip right next to its caption. For instance, the Smart Tag for the Page Header is shown in the following image.

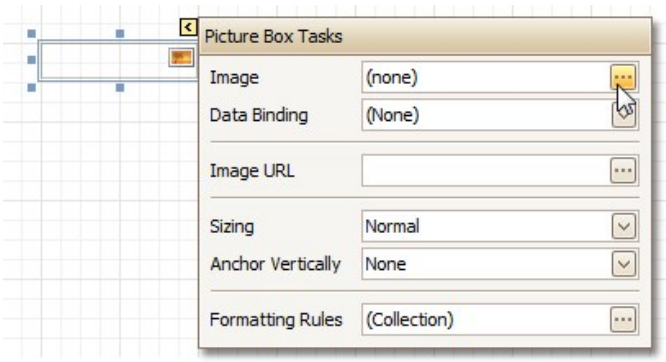


- Control Smart Tag

A control's Smart Tag icon is located at the top right corner of the control. For instance, the Smart Tag for the Rich Text control is shown in the following image.



And, this is the Smart Tag for the Picture Box control.



See also

Context Menu
Control Toolbox
Design Panel
Designer Tab
Field List
Formatting Toolbar
Group and Sort Panel
HTML View Tab
Layout Toolbar
Main Menu
Main Toolbar
Preview Tab
Property Grid
Report Explorer
Scripts Errors Panel

Scripts Tab
Status Bar
Zoom Toolbar

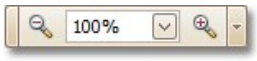
Status Bar

The **Status Bar** is located at the bottom of the Report Designer, and displays hints about currently selected commands in the Main Menu or toolbars.

See also
Context Menu
Control Toolbox
Design Panel
Designer Tab
Field List
Formatting Toolbar
Group and Sort Panel
HTML View Tab
Layout Toolbar
Main Menu
Main Toolbar
Preview Tab
Property Grid
Report Explorer
Scripts Errors Panel
Scripts Tab
Smart Tag
Zoom Toolbar

Zoom Toolbar

The **Zoom Toolbar** allows you to zoom a report in and out, providing easier control over report's layout.



If the Zoom Toolbar is hidden, you can enable it in the Main Menu, by selecting **View | Toolbars | Zoom Toolbar**.

See also
Context Menu
Control Toolbox
Design Panel
Designer Tab

Field List
Formatting Toolbar
Group and Sort Panel
HTML View Tab
Layout Toolbar
Main Menu
Main Toolbar
Preview Tab
Property Grid
Report Explorer
Scripts Errors Panel
Scripts Tab
Smart Tag
Status Bar

Report Controls

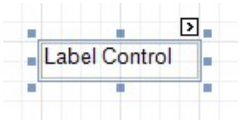
Label

Check Box

See also
Report Designer UI

Label

The most basic Label control is intended to display text in your report. It can represent static or dynamic text, or both. In addition, it can be used to calculate standard summary functions across a data field. The Label's text can only be formatted as a whole. So, if it's required to differently format parts of text, use the Rich Text control.



After a Label is added to a report, you can customize its text, appearance and other properties, which can be accessed in the Property Grid. The most important properties are also available via a control's Smart Tag, which makes it easy to perform common operations. And, the Formatting Toolbar allows you to easily adjust a Label's text formatting.

In the Property Grid, the Label control's properties are divided into the following groups.

Appearance

- **Background Color**

Specifies the background color for the control. This option is also available in the Formatting Toolbar ( ).

- **Borders, Border Color and Border Width**

Specify border settings for the control.

- **Font**

Specifies the font settings for the control. Some of these settings are available in the Formatting Toolbar.

- **Foreground Color**

Specifies the text color for the control. This option is also available in the Formatting Toolbar.

- **Formatting Rules**

Invokes the Formatting Rules Editor, allowing you to choose which rules should be applied to the control during report generation, and define the precedence of the applied rules. To learn more on this, refer to Conditionally Change a Control's Appearance.

- **Padding**

Specifies indent values which are used to render the contents of a Label.

- **Style Priority**

Specifies the priority of various style elements (such as background color, border color, etc.). For more information on style inheritance, refer to Understand Styles Concepts.

- **Styles**

Specifies odd and even styles for the control, as well as to assign an existing style to the control (or a newly created one). For more information on style inheritance, refer to Understand Styles Concepts.

- **Text Alignment**

Specifies the alignment of the control's text. This option is also available in the Formatting Toolbar.

Behavior

- **Anchor Vertically**

Specifies the vertical anchoring style of a Label, so that after page rendering it stays attached to the top control, bottom control, or both. The property setting is useful for data-bound Labels located between upper and lower controls, which are allowed to resize depending on their contents.

Note that if the Anchor Vertically property is set to Bottom or Both, the Can Grow and Can Shrink property (see below) values are ignored, and don't participate in calculating a final height value of this control.

- **Angle**

Specifies the rotation angle of the text. The measurement unit is a degree, and the orientation is counterclockwise. Since standard HTML does not support text orientation, this parameter is ignored when a report is displayed within a web page.

- **Auto Width**

Specifies whether or not a Label's width should be automatically determined based on its text.

- **Can Grow**

When this property is set to Yes, a Label's height can be automatically increased, if required, to display the text. If there are other controls below the current Label, they will be pushed down to prevent them from overlapping. Note that if a control overlaps the growing Label by even one pixel, it will not be pushed down by the growing Label.

- **Can Shrink**

When this property is set to Yes, and the text does not completely fill a Label, then the Label's height will be decreased to the height of its text. If there are other controls below the current Label, they will be moved up to fill the gap. Note that if a control overlaps the shrinking Label by even one pixel, it will not be pushed up by the shrinking Label.

- **Keep Together**

Specifies whether the contents of a Label can be horizontally split across pages. In other words, if a Label occupies more space than remains on the page, this property specifies whether this Label should be split between the current page and the next, or whether it will be printed entirely on the next page. This property is in effect only when a Label's content does not fit on the current page. If it does not fit on the next page either, then the Label will be split, irrespective of this property's value.

- **Multiline**

When this property is set to Yes, a Label processes newline characters found in the text to start a new line. For example, when editing a Label's text, you can insert a new line by pressing ENTER, and in this case, the Multiline property will be automatically set to Yes.

- **Process Duplicates**

Determines the control's behavior when its data source contains consecutive repeating records. They can be processed as is (when the property is set to Leave), suppressed except for the first entry(Suppress) and suppressed with the blank space printed instead of the repeated records (Suppress and Shrink).

- **Process Null Values**

Determines whether to process Null (blank) values if they appear in the control's data source. They can be processed as is (when the property is set to Leave), suppressed (Suppress) and suppressed with the blank space printed instead of the blank records (Suppress and Shrink).

- **Scripts**

This property contains events, which you can handle with the required scripts. For more information on scripting, refer to Handle Events via Scripts.

- **Visible**

Specifies whether the control should be visible in print preview.

- **Word Wrap**

When this property is set to Yes, text entered into the multiline Label is wrapped to the next line if it doesn't fit the line or comes across a newline character. If the this property is set to No, text entered into the multiline Label will be displayed on the same line until a

newline character is entered.

Data

- **(Data Bindings)**

If the current report is bound to data, this property allows you to bind some of the control's properties (Bookmark, Navigation URL, Tag and Text) to a data field obtained from the report's data source, and to apply a format string to it. For more information on this, refer to Display Values from a Database (Bind Report Elements to Data).

- **Lines**

Provides access to the Text property of a Label in the Multiline mode.

- **Summary**

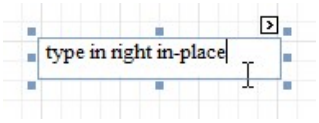
Allows you to perform calculations (summary, max, min, average, etc.) over a data field. For more information on calculating summaries, refer to Add Totals to a Report.
Note
Summarization is possible for a single data column only. To perform calculations with several data fields, use
calculated fields.

- **Tag**

This property allows you to add some additional information to the control; for example its id, by which it can then be accessible via scripts. If the current report has a data source, the Tag property can be bound to a data field obtained from the data source. To do this, expand the (Data Bindings) property and in the Tag.Binding drop-down selector, select the required data field.

- **Text**

Allows you to define a line of static text to be displayed. To type several lines of text, click the control's Smart Tag, and in the invoked actions list, click Edit Text, or use the Lines property. Note that when a Label is selected in the designer, you may simply start typing the text, and it will be automatically entered into the in-place editor.



If the current report has a data source, the Text property can be bound to a data field obtained from the data source. To do this, expand the (Data Bindings) property and in the Text.Binding drop-down selector, select the required data field. For more information on this, refer to Display Values from a Database (Bind Report Elements to Data).

- **Xlsx Format String**

Specifies the native XLSX format string for the control's content, which is to be preserved when the report is being exported to XLSX. This format string is independent from the general value formatting.

Design

- **(Name)**

Determines a control's name, by which it can be accessed in the Report Explorer, Property

Grid or via scripts.

Layout

- **Location**

Specifies the control's location, in report measurement units.

- **Size**

Specifies the control's size, in report measurement units.

- **Snap Line Margin**

Specifies the margin (in report measurement units), which is to be preserved around the control when it is aligned using Snap Lines, or when other controls are aligned next to it.

Navigation

- **Bookmark and Parent Bookmark**

These properties are intended for the creation of a hierarchical structure within a report called a document map. For an explanation and help, refer to Add Bookmarks. If the current report has a data source, the Bookmark property can be bound to a data field, obtained from the data source. To do this, expand the (Data Bindings) property, and in the Bookmark. Binding dropdown selector, select the required data field.

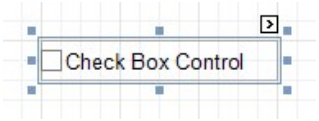
- **Navigation URL and Navigation Target**

Use the Navigation URL property to specify a URL for web browser navigation, when a user clicks a Label. The web browser displays a page in a window or a frame as specified by the Navigation Target property. Note that a URL should have an appropriate prefix (e.g. "http://"). You can create cross-references within the report by assigning the name of the target control to the Navigation URL property, and setting the Navigation Target property to "_self". For more information, refer to Create Hyperlinks. If the current report has a data source, the Navigation URL property can be bound to a data field
obtained from the data source. To do this, expand the (Data Bindings) property, and in the Navigation URL. Binding drop-down selector, select the required data field.

See also
Check Box

Check Box

The Check Box control is intended to display True/False or Checked/Unchecked/Indeterminate states in a report, by displaying (or not) a check mark, which can be accompanied by a text description.



In the Property Grid, the Check Box control's properties are divided into the following groups.

Appearance

- **Background Color**

Specifies the background color for the control. This option is also available in the Formatting Toolbar.

- **Borders, Border Color and Border Width**

Specify border settings for the control.

- **Font**

Specifies the font settings for the control. Some of these settings are available in the Formatting Toolbar.

- **Foreground Color**

Specifies the text color for the control. This option is also available in the Formatting Toolbar.

- **Formatting Rules**

Invokes the Formatting Rules Editor allowing you to choose which rules should be applied to the control during report generation, and define the precedence of the applied rules. To learn more on this, refer to Conditionally Change a Control's Appearance.

- **Padding**

Specifies indent values which are used to render the contents of a Check Box.

- **Style Priority**

Allows you to define the priority of various style elements (such as background color, border color, etc.). For more information on style inheritance, refer to Understand Styles Concepts.
Styles
This property allows you to define odd and even styles for the control, as well as to assign an existing style to the control (or a newly created one). For more information on style inheritance, refer to Understand Styles Concepts.

- **Text Alignment**

Allows you to change the alignment of the control's text. This option is also available in the Formatting Toolbar.

Behavior

- **Anchor Vertically**

Specifies the vertical anchoring style of the control, so that after page rendering it stays attached to the top control, bottom control, or both. The property setting is useful for data-bound Check Boxes located between upper and lower controls, which are allowed to resize depending on their contents.

- **Keep Together**

Specifies whether the contents of a Check Box can be horizontally split across pages. In other words, if a Check Box occupies more space than remains on the page, this property specifies whether this Check Box should be split between the current page and the next, or whether it will be printed entirely on the next page. This property is in effect only when a Check Box's content does not fit on the current page. If it does not fit on the next page either, then the Check Box will be split despite this property's value.

- **Scripts**

This property contains events, which you can handle with the required scripts. For more information on scripting, refer to Handle Events via Scripts.

- **Visible**

Specifies whether the control should be visible in print preview.

- **Word Wrap**

When this property is set to Yes, text entered into a Check Box is wrapped to the next line if it doesn't fit the line.

Data

- **(Data Bindings)**

If the current report is bound to data, this property allows you to bind some of the control's properties (Bookmark, Check State, Navigation URL, Tag and Text) to a data field obtained from the report's data source, and to apply a format string to it. For more information on this, refer to Display Values from a Database (Bind Report Elements to Data).

- **Check State**

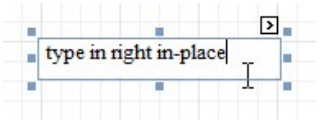
This property allows you to quickly specify the Checked/Unchecked/Indeterminate state of a Check Box (the Indeterminate state is displayed as a grayed out checked box.) Note that if you only want to use Checked and Unchecked states, you may use the Checked property, instead.

- **Checked**

This property allows you to define whether a Check Box is checked or not.

- **Tag**

This property allows you to add some additional information to the control; for example its id, by which it can then be accessible via scripts.



If the current report has a data source, the Tag property can be bound to a data field obtained from the data source. To do this, expand the (Data Bindings) property and in the Tag.Binding drop-down selector, select the required data field.

- **Text**

Allows you to define a line of static text to be displayed. Note that when a Check Box is selected in the designer, you may simply start typing the text, and it will be automatically entered into the in-place editor. If the current report has a data source, the Text property can be bound to a data field obtained from the data source. To do this, expand the (Data Bindings) property, and in the Text.Binding drop-down selector, select the required data field. For more information on this, refer to Display Values from a Database (Bind Report Elements to Data).

- **Xlsx Format String**

Specifies the native XLSX format string for the control's content, which is to be preserved when the report
is being exported to XLSX. This format string is independent from the general value

formatting.

Design

- **(Name)**

Determines a control's name, by which it can be accessed in the Report Explorer, Property Grid or via scripts.

Layout

- **Location**

Specifies the control's location, in report measurement units.

- **Size**

Specifies the control's size, in report measurement units.

- **Snap Line Margin**

Specifies the margin (in report measurement units), which is to be preserved around the control when it is aligned using Snap Lines, or when other controls are aligned next to it.

Navigation

- **Bookmark and Parent Bookmark**

These properties are intended for the creation of a hierarchical structure within a report called a document map. For an explanation and help, refer to Add Bookmarks. If the current report has a data source, the Bookmark property can be bound to a data field obtained from the data source. To do this, expand the (Data Bindings) property and in the Bookmark.Binding drop-down selector, select the required data field.

- **Navigation URL and Navigation Target**

Use the Navigation URL property to specify a URL for web browser navigation when a user clicks a Check Box. The web browser displays a page in a window or a frame as specified by the Navigation Target property. Note that a URL should have an appropriate prefix (e.g. "http://"). You can create cross-references within the report by assigning the name of the target control to the Navigation URL property, and setting the Navigation Target property to "_self". For more information, refer to Create Hyperlinks. If the current report has a data source, the Navigation URL property can be bound to a data field obtained from the data source. To do this, expand the (Data Bindings) property and in the Navigation URL.Binding drop-down selector, select the required data field.

See also
Label

Preview and Print Reports

This opening paragraph should describe the feature that you are documenting. Explain how it is commonly used and what the benefits are. For example: The Widget Master email link allows you to easily send information about each widget to various departments within your company. Often, the feature that you are documenting can be best explained by walking the reader through step by step. Use screenshots to illustrate the steps where possible.

1. Start the application by…
2. On the startup screen, click the…
3.

See also

Welcome
Outreach Installation
Email Marketing with Outreach|IT
Licensing
RDP License
System Requirements
About Outreach|IT
Quick Start
How to Use OUTREACH|IT
Outreach Settings
Creating Reports
How to create email template
How to create Outreach Schemas
Report Designer
Report Editing Basics
Create Reports
Report Designer Reference
Support

Support

Free Support

Paid Support

How to submit a ticket directly from your addon

See also

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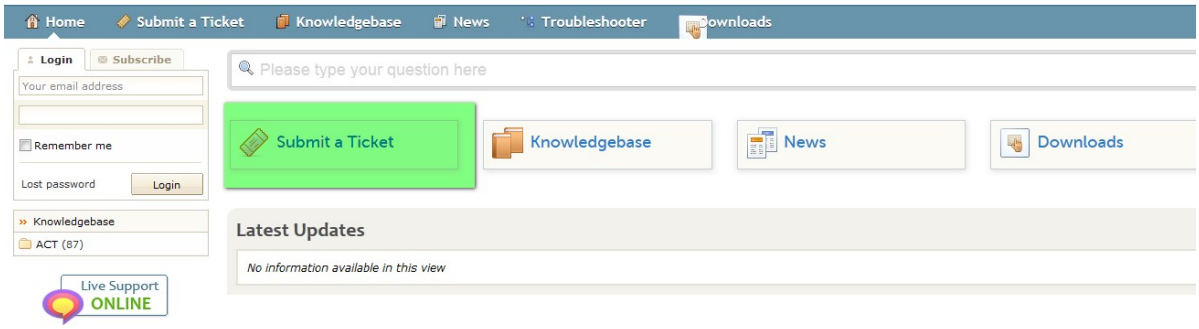
How to Use OUTREACH|IT
Outreach Settings
Creating Reports
How to create email template
How to create Outreach Schemas
Report Designer
Report Editing Basics
Create Reports
Report Designer Reference
Preview and Print Reports

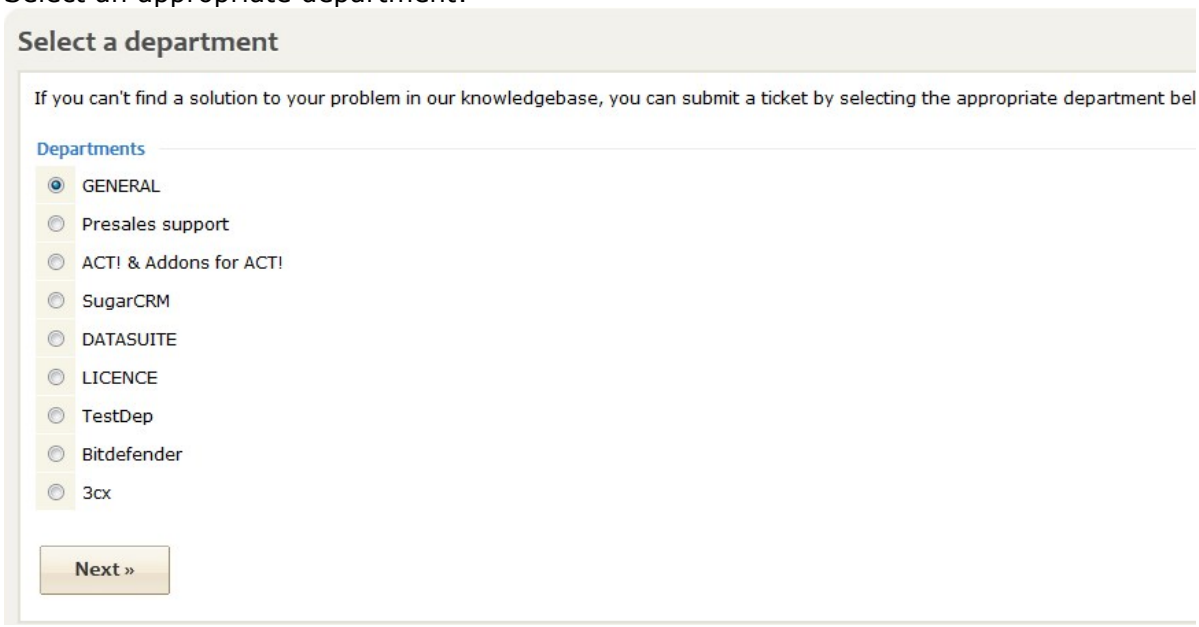
Free Support

Free support is provided for the first installation and all technical questions. The support is provided via our Ticketing System. Before submitting a ticket to our support team, please read our User Manual and check if the issue is already described in our Knowledge Base. In case you cannot find a solution to your issue in our documentation, please submit a ticket to our support team.
To submit a ticket, please follow the below steps or submit a ticket right from your addon :

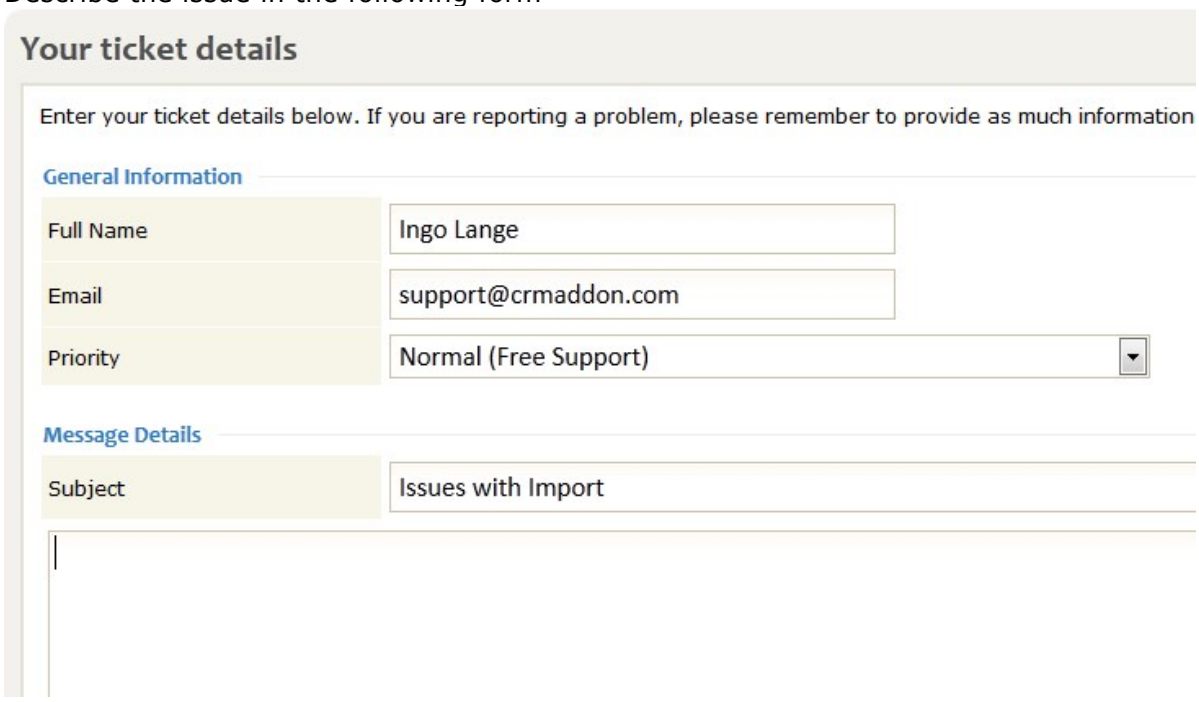
1. Open our Ticketing system



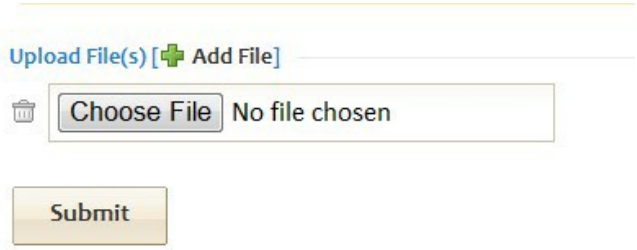
2. Select an appropriate department:



3. Describe the issue in the following form



4. In some cases it might be necessary to attach some screenshots with the errors or



send schemas and databases.

5. Click **"Submit"** button to create your ticket

See also
Paid Support
How to submit a ticket directly from your addon

Home > Support > Paid Support

Paid Support

If you require support for more than one installation or extended help, we encourage you to purchase our reasonably priced time based or flat rate support.

You can purchase support based on actual time used which is fine if you consider the problem to be minor, or our flat rate support which is the better choice if you don't know what may be causing the problem or if you consider the problem to be rather time consuming.

Please fill in the payment form fr the support type you chose. As soon as we receive your payment we will send you an email with a phone number to call. The actual support takes place via a remote session.

Please note: Our time based support is being charged in advance and will be billed in 15-minute units. Our flat rate support will also be charged in advance. It is valid for one installation only. We will download, install and configure everything for you using a remote session .

See also
Free Support
How to submit a ticket directly from your addon

Home > Support > Paid Support > Request support

Request Support

We offer support via remote session (chat). In preparing yourself for this online meeting, follow these steps:

1. Please make sure you are inquiring during our support business hours from **1:00am till 1:00pm CST** (on business days).
2. Download and run TeamViewer (TeamViewer leaves no traces on your computer since it is a zero-footprint software). The program will automatically provide you with a session ID and a password.
3. Open a Chat session by clicking on the Live Support Online button located in the top right corner on every page of our website, and return the TeamViewer session ID and

password to our support engineers.
4. Leave TeamViewer and the Chat tool running until our support person contacts you. Occasionally this may take some time, depending on how busy they are.

Note: TeamViewer must be running uninterruptedly during the remote session. If for any reason TeamViewer is being closed from your end you need to go back to step 3.
Note 2: If it takes unreasonably long for a support person to process your request (longer than 60 minutes) please make sure you sent your support request during our business hours and your computer is being monitored while you're waiting.

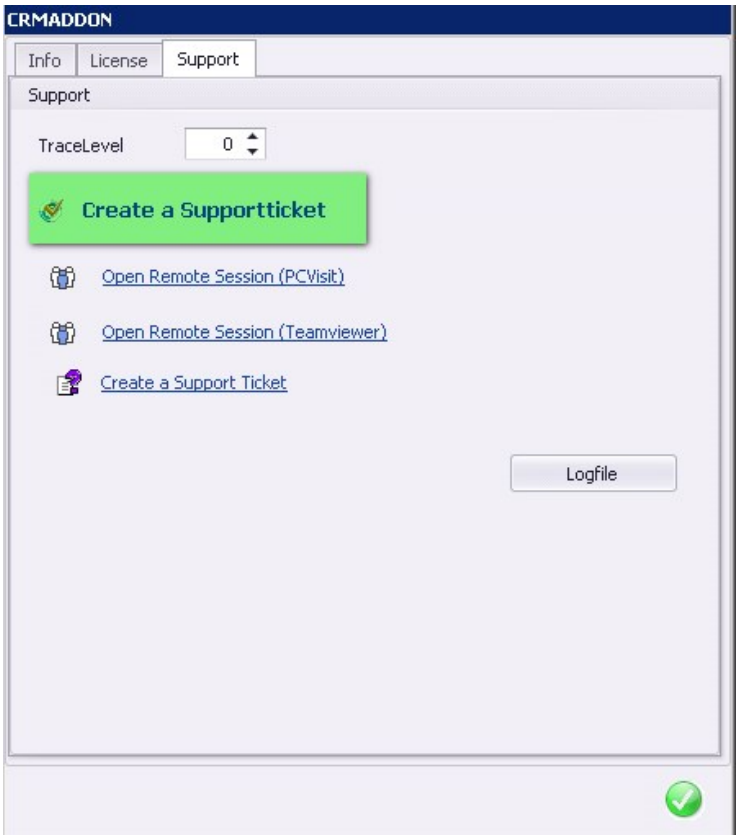
To be able to help you quickly and competently we require certain details:

1. The product's license number
2. Where and when did you purchase the product?
3. Which version of Act! has been used when you did the first install of the add-on?
4. Which version of Act! is currently installed on your computer?
5. Please make sure you direct your support inquiry to the right department. Replying to a "General" query takes typically longer as it has to be re-directed to the concerned support unit.
6. Finally, please describe the problem in one sentence (what is the add-on supposed to do, what's it actually doing or not doing, what's the difference to the state before, what has changed?)

See also

How to submit a ticket directly from your addon

Each addon is supplied with a separate module that allows creating support tickets directly from the addon interface. To take advantage of this functionality, please follow Support tab of your addon and select there '**Create a Supportticket**'

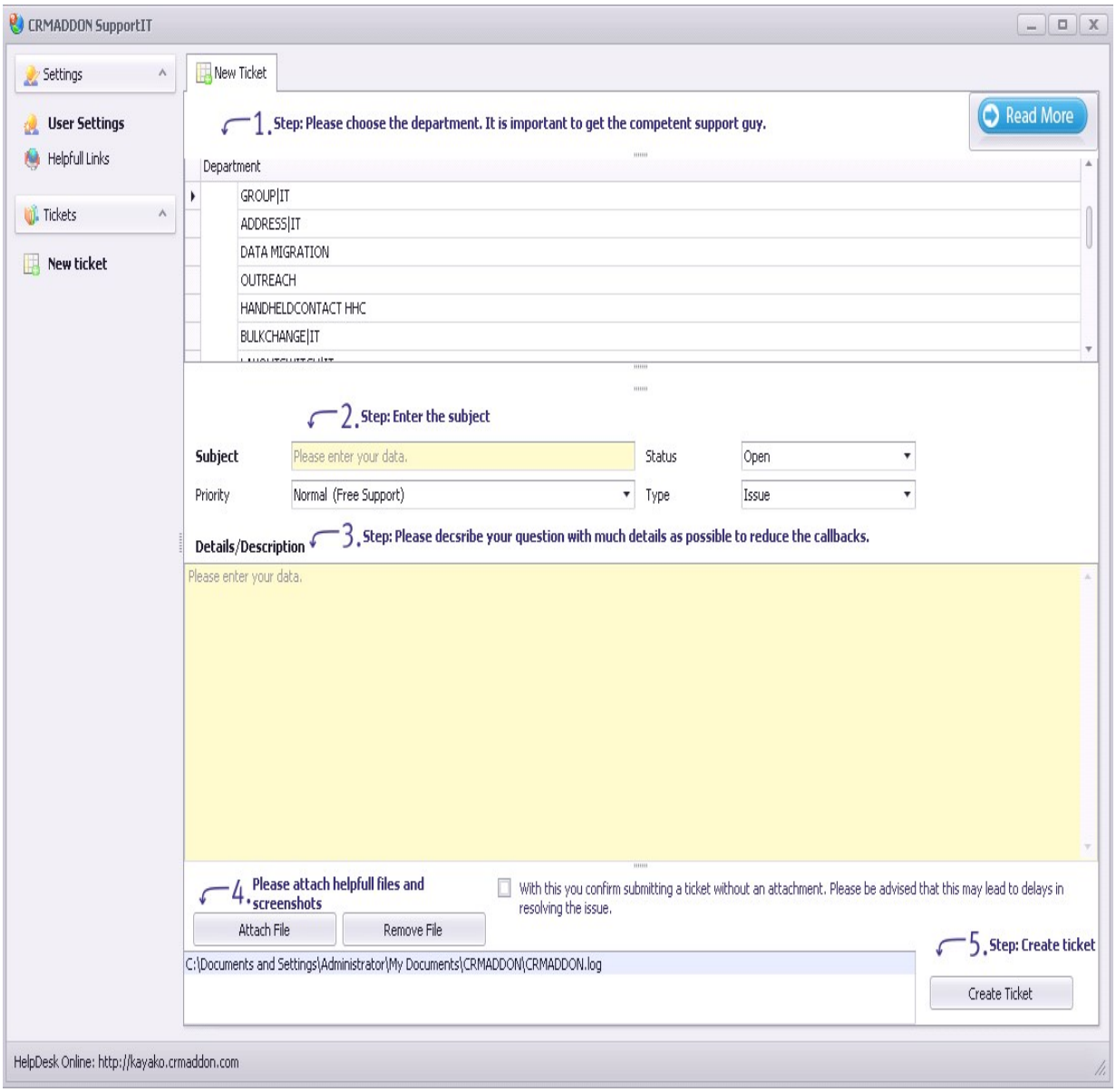


When creating a ticket through this interface your log files are attached automatically. It is also possible to restart your Act! to reproduce the issue without closing this tool.

Right after clicking '**Create a Supportticket**' link you will be offered to provide your email. Please make sure you insert the correct email as it will be used to create an account in our system and we will get in touch with your regarding the issue through this email:

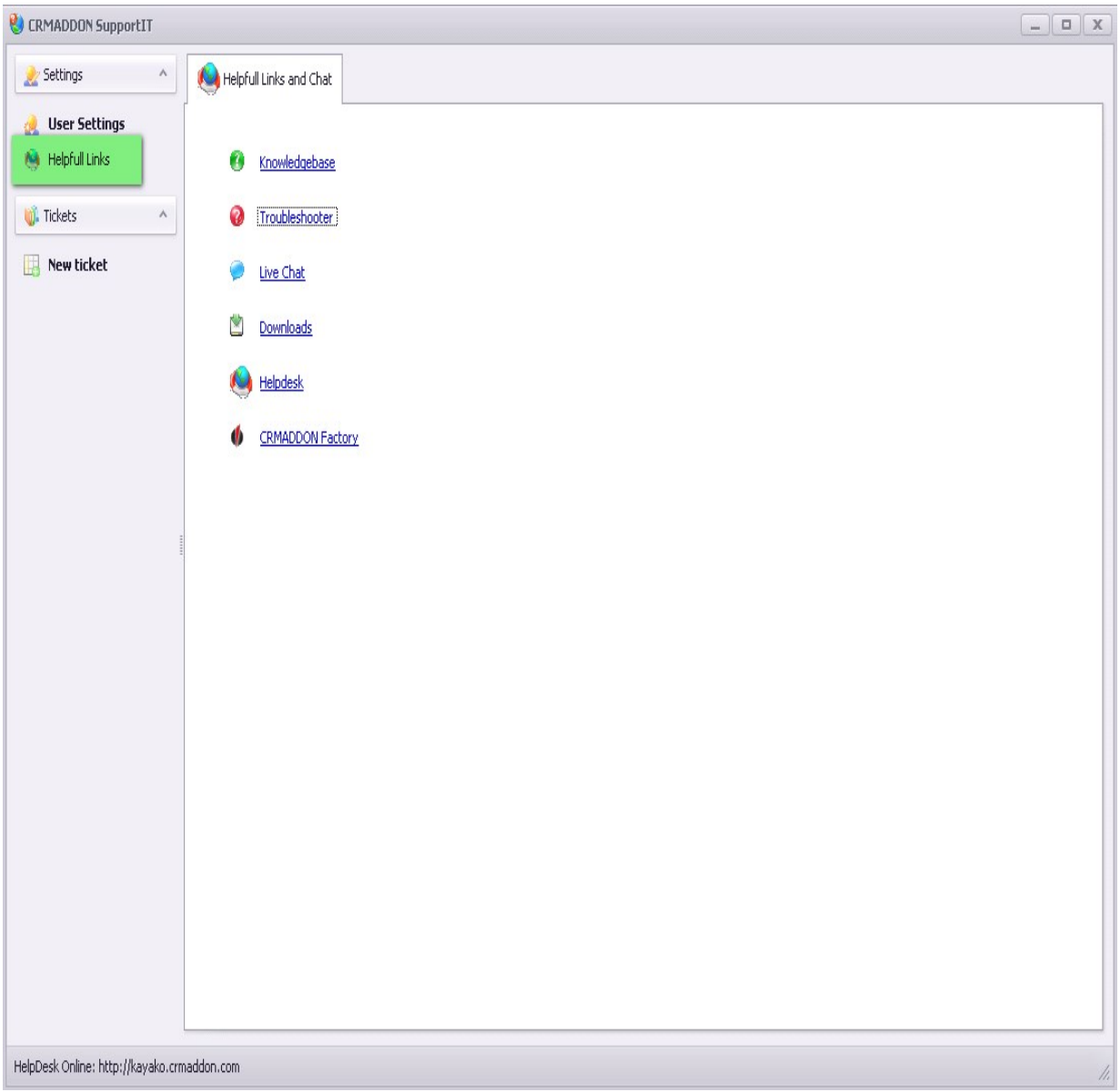
CRMADDON Support | IT
Your email address is required for submitting a ticket. Please check your email and confirm it. Kindly make sure that you submit the correct email and all related information as this data will be used by our support team and for registration in our SupportSuite
Enter/Confirm the Email for registration:
yŗuremail@anydomain.com
Confirm Email

On the following dialog you can create a ticket for our support team:

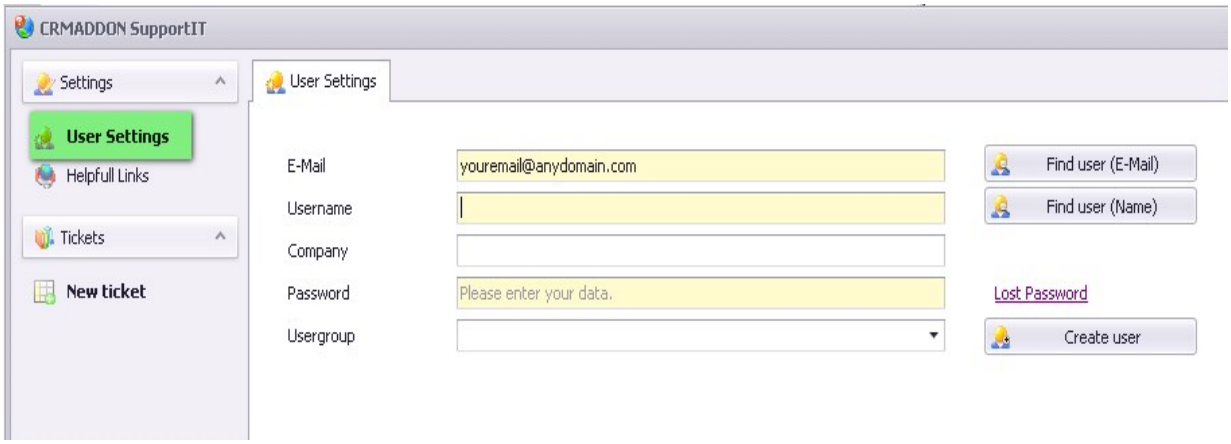


'**Department**' - Please select the corresponding to your addon department
'**Subject**' - Add a subject to your ticket. We suggest making a short issue description in your subject
'**Status**' - Select a status for your ticket
'**Type**' - Select a type for your issue
'**Priority**' - Select your ticket priority. Please be advised that free support tickets are normally processed within 24 hours during business days. However, if you'd like to have your ticket to be handled with highest priority, please consider purchasing our paid support .
'**Details / Description**' - Please add a detailed description of the issue
'**Attach File**' - Besides log files, please attach all files (screenshots, schemas or copies of your databases) that will help us to better understand the issue.
'**Create a ticket**' - Click this button to create a ticket.

Please visit **Helpful Links** section, probably you will find there the answer to your question or the solution to your issue



User Settings menu item leads to the section where you can add your user data:



See also

Free Support
Paid Support

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